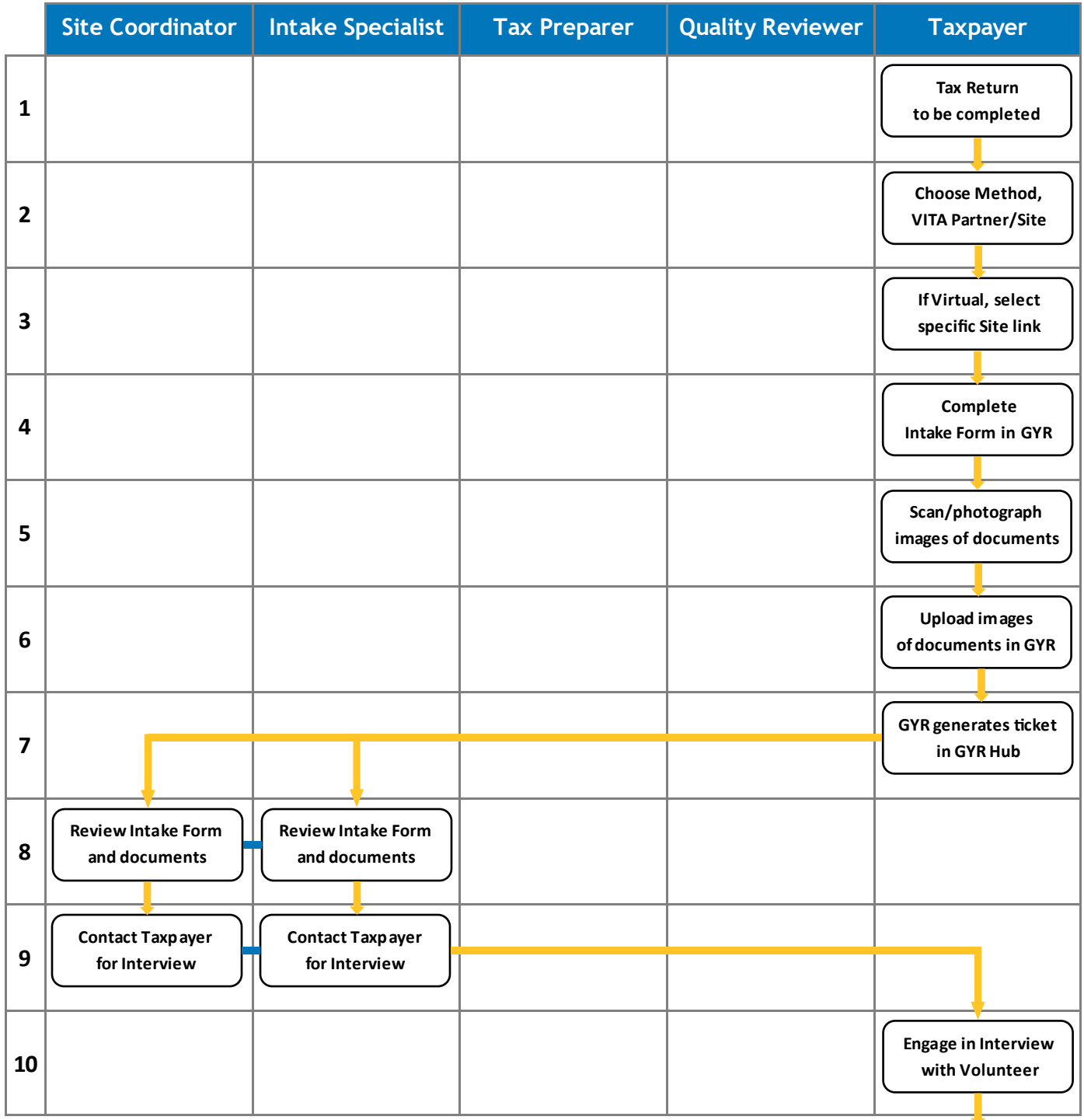


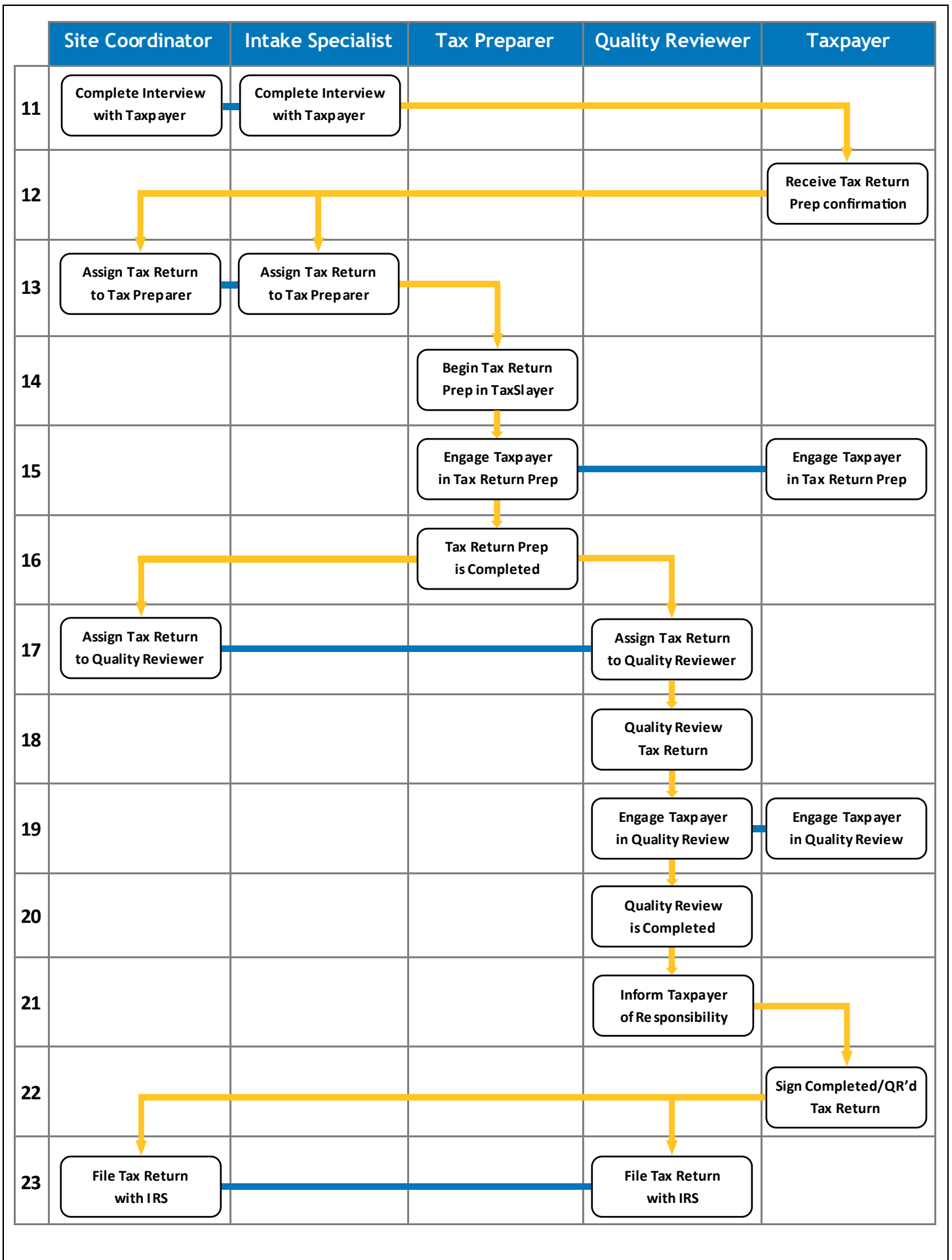
VITA 2020-2021 Get Your Refund Resource Guide for Volunteers



VITA Florida Taxpayer Opportunity Network (FL TON)
January 2021

Get Your Refund Work Flow for Volunteers and Taxpayers





Get Your Refund Work Flow Steps for Volunteers and Taxpayers

Note: The *Get Your Refund platform* features two different views. The “Hub” is the view used by VITA Volunteers and Staff Members; *GetYourRefund.org* is the view used by the Taxpayer, accessed directly via the URL link.

- 1) Taxpayer desires to have their Tax Return completed at a VITA site.
- 2) Taxpayer calls 2-1-1 or visits *MiamiTaxPros.com* to choose their preferred method for Tax Return Prep and their preferred VITA partner or VITA site location.
- 3) If the Taxpayer selects the virtual Tax Return Prep option, they will select a link to the specific site leading to the Intake Sheet screen.
- 4) Taxpayer completes the Intake Sheet fields that appear in *GetYourRefund.org*.
- 5) Taxpayer scans or takes photo images of all supporting documents.
- 6) Taxpayer provides all supporting documents for Tax Return Prep by uploading them into *GetYourRefund.org*.
- 7) *GetYourRefund.org* generates a ticket that appears in the VITA Volunteer / Staff Member view of the selected VITA site platform, referred to as the *Hub*, signifying that a new Taxpayer Tax Return is requested.
- 8) Site Coordinator or Intake Specialist reviews the submitted Intake Sheet and uploaded Taxpayer documents to ensure they are complete, thorough and accurate.
- 9) Site Coordinator/Intake Specialist contacts the Taxpayer through *GetYourRefund.org* (which generates an e-mail message to the Taxpayer).
- 10) Site Coordinator/Intake Specialist engage the Taxpayer in the Interview to ensure the provided documents are complete, thorough and accurate. The Site Coordinator/Intake Specialist addresses all checkboxes marked “Unsure.”

***Get Your Refund* Work Flow Steps for Volunteers and Taxpayers**

- 11) Site Coordinator/Intake Specialist completes Interview with the Taxpayer, and determines that the Taxpayer Intake Sheet and supporting documents are ready for Tax Return Prep.
- 12) Taxpayer receives a confirmation through *GetYourRefund.org* (which generates an e-mail message to the Taxpayer) informing them that the Tax Return Prep process will begin.
- 13) Site Coordinator/Intake Specialist assigns the Tax Return and the Taxpayer to a VITA Volunteer Tax Preparer.
- 14) VITA Volunteer Tax Preparer begins the Tax Return Prep process in TaxSlayer.
- 15) VITA Volunteer Tax Preparer may engage the Taxpayer in the Tax Return Prep process. As communication is required, Tax Preparer sends a message through *GetYourRefund.org* (which generates an e-mail message to the Taxpayer).
- 16) VITA Volunteer Tax Preparer completes the Tax Return Prep process in TaxSlayer.
- 17) Site Coordinator will assign to a Quality Reviewer, or the Quality Reviewer will access the completed Tax Return awaiting Quality Review.
- 18) Quality Reviewer conducts Quality Review of the prepared Tax Return.
- 19) Quality Reviewer must engage the Taxpayer in the Quality Review process. As communication is required, Quality Reviewer sends a message through *GetYourRefund.org* (which generates an e-mail message to the Taxpayer).
- 20) Quality Review is completed.
- 21) Site Coordinator or Quality Reviewer informs the Taxpayer of their responsibility to the prepared and Quality Reviewed Tax Return.
- 22) Taxpayer is required to sign the prepared and Quality Reviewed Tax Return.
- 23) Site Coordinator/Quality Reviewer files the Tax Return, ideally using the E-File option in TaxSlayer.

Additional Notes Supporting the *Get Your Refund* Work Flow Steps for Volunteers and Taxpayers

- a) Although only four (4) VITA Site operational roles are identified in this Work Flow, the roles of **Site Coordinator**, **Intake Specialist** (an optional role, but may be helpful for a Site to develop to facilitate virtual Tax Return Preparation), **Tax Preparer** and **Quality Reviewer**, the learning resources supporting *Get Your Refund* identify other possible Volunteer roles that may assist in supporting Taxpayer Tax Return completion.

These additional roles include:

- Greeter/Screenener
- Client Support Specialist
- Full Service Assister
- Valet Assister
- Do-It-Yourself (DIY) Assister

Please refer to the definitions for each of these additional VITA Site operational roles on the *Get Your Refund* Training website portal.

- b) The entire Work Flow process described within this resource guide is supported by ongoing communication with:
- VITA Program Leaders
 - VITA Partner Leaders and Volunteers
 - Peer Site Coordinators (using the WhatsApp thread)
 - Peer Volunteers
 - IRS Publication 4012
 - VITA Tax Preparer Hotline (hotline phone number appears on the back cover of IRS Publication 4012)
 - Internal Revenue Service (IRS) Stakeholder Partnerships, Education and Communication (SPEC) Relationship Managers
- Communication with all additional resources noted above may occur using platforms outside of *Get Your Refund*, including phone, text, Zoom, Whatsapp, Teams, etc.