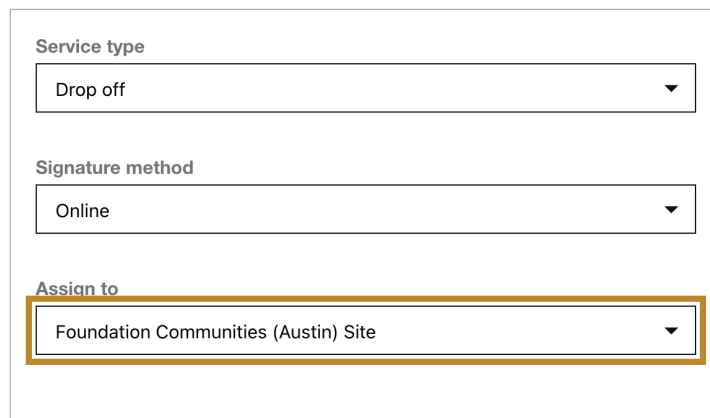


How To Create A Ticket In The Hub

1. Log into the Hub: https://www.getyourrefund.org/en/hub/sign_in. Note that the system will time out if you have not been active.
2. Click the **ADD CLIENT** button. Do not use the CTC client option, that is a feature that we are not using at this time.
3. Verify that these options have been selected:
 - a. **SERVICE TYPE:** DROP OFF
 - b. **SIGNATURE METHOD:** IN PERSON
 - c. **ASSIGN TO:** Foundation Communities (Austin) Site

Add a new client



The screenshot shows a form titled "Add a new client" with three dropdown menus. The first menu is labeled "Service type" and has "Drop off" selected. The second menu is labeled "Signature method" and has "Online" selected. The third menu is labeled "Assign to" and has "Foundation Communities (Austin) Site" selected. The "Assign to" dropdown is highlighted with a red border.

4. Enter the client's first and last name.
5. For preferred name field, use the [Hub Ticket Naming and Modifiers](#) document. The preferred name will be the primary taxpayers first and last name without any middle initials or the spouse's name, the tax year(s), **and any defining characteristics of the tax return or intake.**

Examples:

ELLE EGGPLANT TY22

AMY AVOCADO TY20 TY21 TY22

TINA TOMATO TY20+NY

PETER PEPPER TY21 TY22 +ITIN

CARL CARROT TY21+MFS TY22

6. Enter the client's cell phone number and email address. The client must provide at least one of these methods of contact. Be sure to click to opt in to notifications.
7. Enter the rest of the client's information. Leave **Type of Navigator** blank.
8. Choose the appropriate certification level and the tax years that we will be preparing.

NOTE: We cannot add a tax year prior to 2021. In these cases, use the ticket naming modifiers to indicate which tax years are included on the tax return, eg, TY17, TY16.

9. Click **SEND FOR PREP** and the ticket will be generated and appear onscreen.
10. Verify that the ticket status is **Tax Prep: Ready for Prep**.
11. **Verify that the client has received a text message or email** from Get Your Refund/The Hub. This is how we will communicate with the client.

Note: If the client DID NOT RECEIVE an email or text message, check:

- a. Did you enter the phone number and email address correctly?
- b. Did you select **Opt In for Notifications** in the Client Profile?

12. Click on the down arrow in the **ASSIGN +** field in the upper right-hand corner.

- a. For Drop Off tickets, select **DO Manager** from the list.
- b. For FSS tickets, select **Rania Ghallab** from the list.

13. Click on the green checkmark to finalize the ticket assignment!

14. Confirm that the preferred name includes the tax year(s) and any modifiers, you have made the correct assignment, the certification level is correct, and that the status is Ready for Prep

SCOOBY DOO TY21 +MIL

#53137
 Flagged
 Foundation Communities (Austin)

Last client update: 1/6/2022 12:49 PM CST

2021 MARIANNE WAGNER

Ready for prep

15. Click on the **Documents** tab in the ticket.

16. Click **ADD DOCUMENT**.

17. Indicate the document type from the drop down menu (select Other if there is not an obvious match), name the document using the site abbreviation, intake, and tax year.

The screenshot shows a web browser window with the URL `demo.getyourrefund.org/en/hub/clients/53137/documents/new`. The page title is "Add document | Scooby Doo". The client information is "SCOOPY DOO TY21 +MIL #53137" and "Foundation Communities (Austin)". The last client update is "1/6/2022 12:49 PM CST". The form fields are: "Select file" with a "Choose File" button and the text "scenario 1 intake.pdf"; "Display name" with a text input field containing "NO INTAKE TY21"; "Document type" with a dropdown menu set to "Other"; "Tax return" with a dropdown menu set to "2021", which is highlighted with a yellow border; and an "Archive document" checkbox which is unchecked. At the bottom are "Save" and "Cancel" buttons. The left sidebar shows navigation options: "The Hub", "All Clients", "My Clients", "My Updates", "Tools", and "MARIANNE WAGNER" with a "Sign out" button.

18. Click on **Save**.

19. Click on the **Notes** tab in the ticket.

20. Enter any notes for the preparer. Notes are very helpful for Drop-Off since they do not have the client in front of them. Please include any information you think the preparer will need to know.

21. Place all the client's tax documents in the Client Envelope and return to the client.