

Code for America GetYourRefund Tutorial

A huge thank you to Campaign for Working Families for creating this guide.



**United Way of Greater
Richmond & Petersburg**

**OUR TAX EXPERTS
ARE HERE FOR
YOU.**

**SEE HOW EASY
IT IS TO
FILE FREE TODAY.**



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Free tax filing, real human support.

Maximize your refund by filing with our trusted volunteers.

[Get started](#)

Note: The federal income tax filing deadline has been extended to July 15, 2020. You do not need to file any additional forms or call the IRS for the extension. We encourage you to file today as you may be due a refund that can help support your household.



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You will use the secure online tool at GetYourRefund to verify who you are and upload your tax documents for our review.

How are you feeling about your taxes?



We know taxes can be hard and we're here to support you every step of the way!

Note: The federal income tax filing due date has been automatically extended to **July 15, 2020**.

[Start my taxes online](#)

[Find a local site](#)

You will not be able to save your answers and log back in. Answer all questions in one session. Don't worry-we will talk with you over the phone once we get your information!



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What years do you need to file for?

Select all that apply.

2019

2018

2017

2016



Select the year(s) you are filing



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Let's get started

We'll start by asking about your situation in 2019.

This is just a starting point, you will be able to discuss your situation in depth with your tax specialist over the phone.

Continue



GetYourRefund.org is a non-profit service built by [Code for America](#) in partnership with IRS-certified Volunteer Income Tax Assistance (VITA) sites nationally.



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If you get stuck along the way, simply email us at tax@yourunitedway.org

Just a few simple steps to file!

Our form should take you about 30 minutes to complete.



Answer Questions

We'll ask you a series of questions about your finances.



Submit documents

Share all necessary documents (ID, W-2's, 1099, 1095-A,B,C).



Phone review

Your tax preparer will review everything with you over the phone.



Get your refund

If you choose to file your taxes, our tax volunteers will help you e-file.

[Continue](#)



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Simple steps to getting your refund!

First, let's get some basic information.

Welcome, we're excited to help you. We need some basic information to get started.

Preferred name

State of residence

Continue



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Our team at United Way of Greater Richmond and Petersburg is here to help!

We know taxes can be hard and we're here to support you every step of the way!

If you have questions, you can chat with us by clicking the button in the bottom right of your screen.

Continue



Please share your contact number.

Once you've answered all the tax questions, your tax preparer will call to review your tax situation.

Phone number

Confirm phone number

This number can receive text messages

Continue



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Please share your e-mail address.

An e-mail is required for the final signature on your tax return.

E-mail address

Confirm e-mail address

Continue



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How can we update you on your tax return?

We will reach out with questions and updates. Select the option(s) that you prefer!

Email Me

Text Me

Note: We will not share your information with any outside parties.

Continue



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Great! Here's the legal stuff...

You understand the information you provide this site (GetYourRefund.org) is sent to a Volunteer Income Tax Assistance (VITA) preparation site in order for an IRS-certified volunteer to review your information, conduct an intake interview on the phone, prepare the tax return, and perform a quality review before filing your taxes.

You agree to the terms of the GetYourRefund privacy policy at www.GetYourRefund.org/privacy

By proceeding, you confirm that the following statements are true and complete to the best of your knowledge.

I agree

You must opt in to the process. Then you will answer intake questions. Try your best but don't worry. You will have a chance to talk to us about your situation.



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Collect all your documents and have them with you.



In the next pages, we'll be asking for the following:

- Social Security Number or ITIN
- Current driver's license, state ID, or passport
- Employment tax documents (W2's, 1099, etc)
- Any other official tax documents

We will also need to verify that you have a valid phone number and e-mail.

Continue



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Be sure you have all documents ready before you begin.



First, we need to confirm your basic information.

To protect your identity and ensure that your personal information is accurate and secure, we need to verify who you are.

The IRS requires us to verify who you are with multiple forms of identity.

 Your information is secure and the information you provide will be handled in accordance with our [privacy policy](#).

Continue



Confirm your identity with a selfie



The IRS requires us to verify who you are for tax preparation services. We're reviewing a photo of you holding your ID card.



Helpful tips for taking a selfie:

- Make sure your face is clearly visible
- Make sure you aren't covering up your ID
- Face the camera directly and include from your shoulders to the top of your head, similar to the example photo
- Use a plain wall as a background if possible
- If you're wearing glasses in your ID photo, wear them in your selfie photo



Submit a selfie



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Attach photos of Social Security Card or ITIN

The IRS requires us to see a valid Social Security Card or ITIN Paperwork for everyone in the household

We will need a SSN or ITIN for:

- John Citizen
- Jane Citizen

Select a file



Continue



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Attach your W-2's

You should have this form because you said that you worked a job with wages or a salary. Your employer should have sent you this form and you can contact them if you haven't received it. More information is available [here](#).

 Select a file

 I'm done for now

 I don't have this document



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About



Uploading your documents is easy!



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Just take a pic with your mobile device and upload.



Do you have any time preferences for your interview phone call?

For example, "Tuesday or Thursday evenings". We'll pass this info along to your interviewer. There is no guarantee that they will be able to call you at your preferred time.

Continue →



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Tell us when is the best time to call you.



If due a refund, how would like to receive it?

Direct deposit (fastest)

Mail me a check (slower)

Continue



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Choose how you'd like your refund. If Direct Deposit, we'll take that information by phone.



What is your mailing address?

Street address

123 East Main Street

City

Richmond

State

Virginia

ZIP code

23225

Confirm



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Your tax information has been successfully submitted!

Submitted at 2:56pm on April 15, 2020.

What to expect next

You should receive a confirmation by text message shortly.

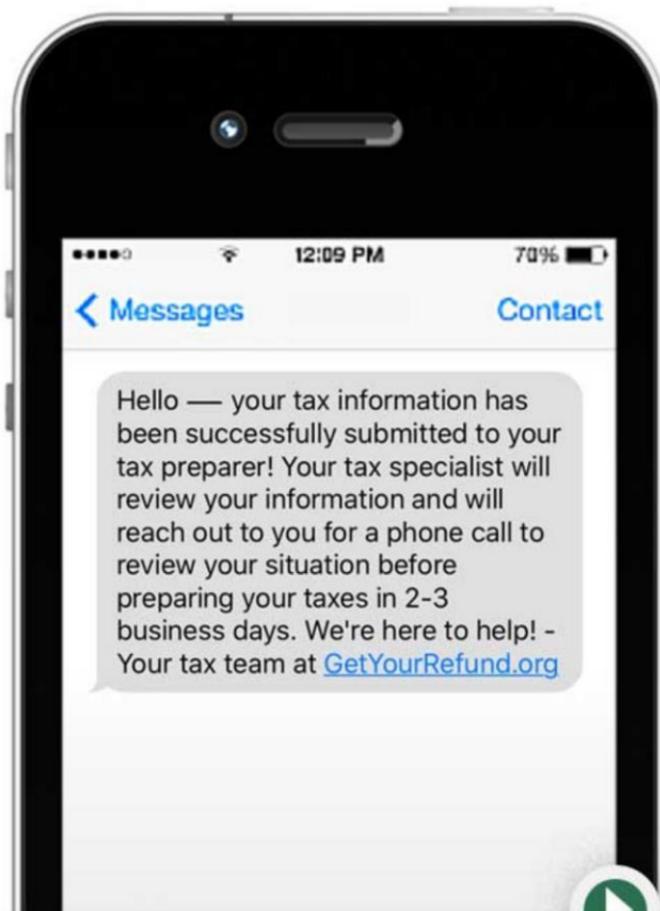
Our tax preparers will review your situation and be in touch within the next few days.



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Congrats! Your tax info is safely in our hands for review.



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You'll receive a text/email confirmation that your information was submitted.

**United
Way**



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REVIEW BY PHONE

An IRS-certified preparer will review your information and work with you to maximize your refund.

**WE WILL FILE
YOUR TAXES.**

FILE NOW



Now...we file for you...FREE!



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