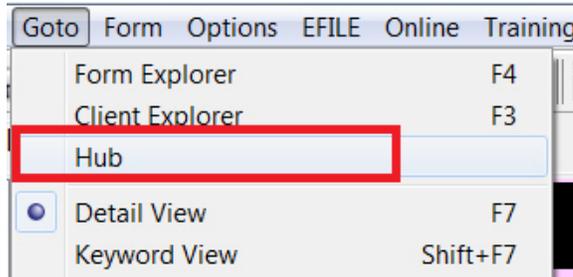


## Using Checklists in Hub

Hub allows users to maintain a checklist of tasks and/or requests assigned to a client. This is an automatically generated list based on your client’s prior-year return that can be added to or changed as needed.

### Reviewing a Checklist

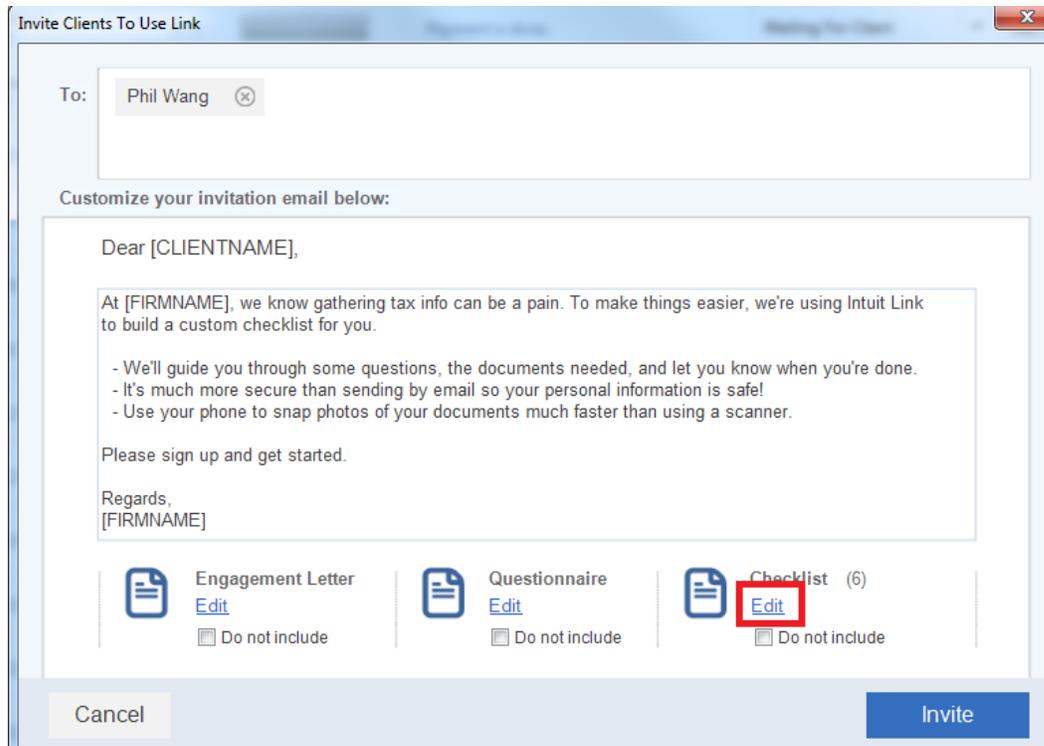
1. Open the ProFile application.
2. Select the “Hub” option from the “Goto” menu in the top toolbar.



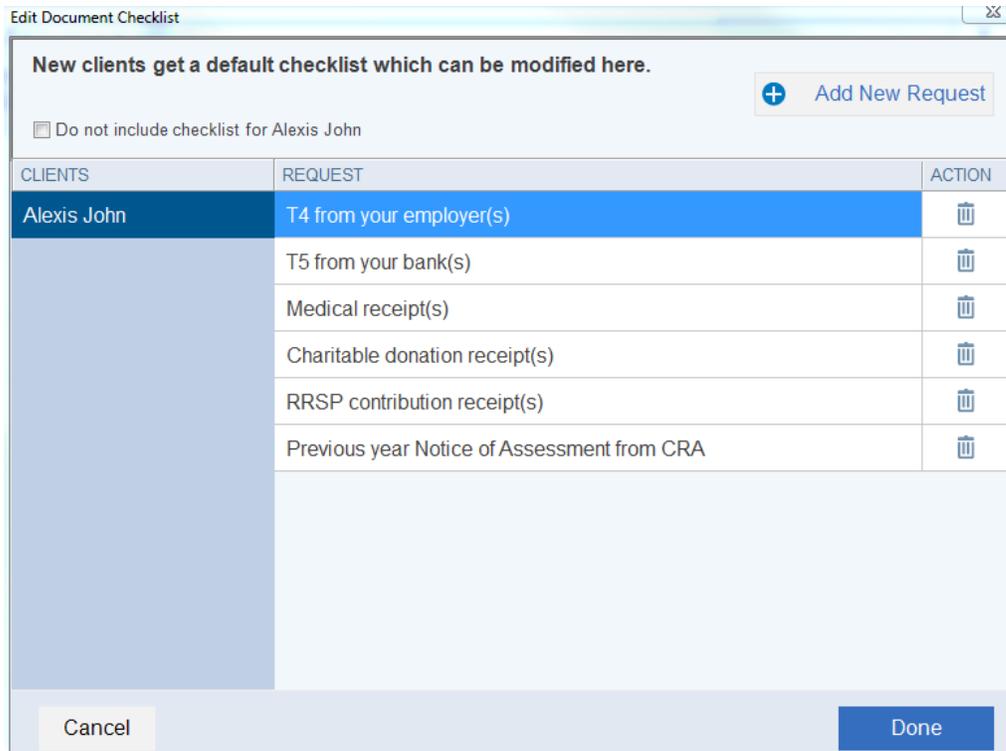
3. Hub opens, displaying a list of clients. Identify the client to whom you want to create a checklist for (e.g., “John, Alexis”). Click the “Invite” button associated with the client.

CLIENT INFORMATION		DATA COLLECTION		NOTES AND STATUS		
NAME	FILE NAME	INTUIT LINK	COMMENTS	STATUS	LAST SAVED	
Simpson, Jessica (647) 777-7776	JessicaSimpson V2.123.15T	0/12	Payment is done.	Waiting For Client	Dec 16, 2016	
Simo, Jessica (647) 777-7776	JessicaSimpson V2.123.15T	0/12	Payment is done.	Completed	Dec 14, 2016	
Gupta, Varun	T2205_1.15T	Invite	This is an awesome file completed through the ProFile Hub	Carried Forward	Jan 30, 2017	
Smith, John	T2205_10.15T	Invite Rejected	This is a sample character limite	In Partner Review	Dec 14, 2016	
Wang, Phil	T2205_159.15T	Invite	Add Note	Work In Progress	Dec 14, 2016	
John, Alexis (647) 949-6946	T2205_160.15T	Invite	Add Note	Work In Progress	Dec 16, 2016	

4. The “Invite Clients to Use Link” window opens. Select the “Edit” link from the “Checklist” option.



The “Edit Document Checklist” window displays. The checklist details the client, the individual requests made to the client (based on the previous-year’s requests) and the action that can be undertaken.



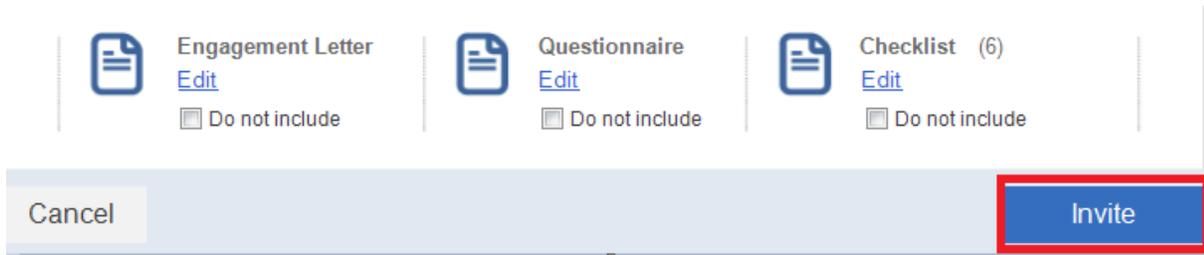
## Deleting an Existing Checklist Entry

1. Identify the checklist entry to be deleted.

2. Click on the “trash” icon  next to the checklist entry under the “ACTION” menu; the entry deletes.

Note: Hub users will not see a confirmation window; the checklist entry deletes immediately.

3. Click the “Done” button. The checklist updates and the “Edit Document Checklist” window closes.
4. Click the “Invite” button in the “Invite Clients to Use Link” window.



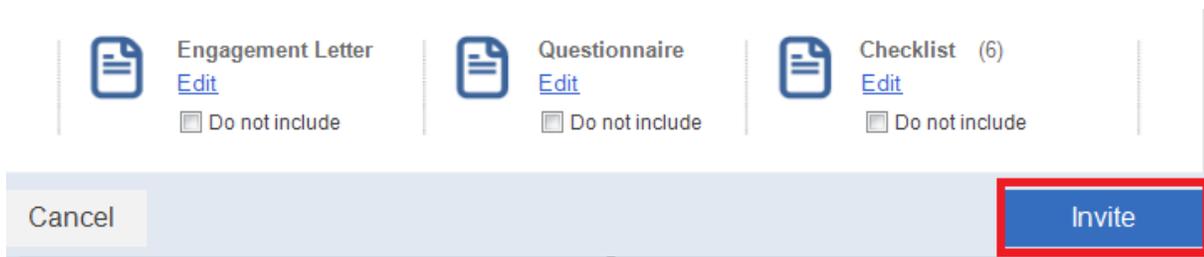
The invitation with the checklist is sent to the client.

## Adding a New Checklist Entry

1. Click the “Add New Request” button in the “Edit Document Checklist” window. A new blank checklist entry field is created.

REQUEST	ACTION
T5 from your bank(s)	
Medical receipt(s)	
Charitable donation receipt(s)	
RRSP contribution receipt(s)	
Previous year Notice of Assessment from CRA	
<input type="text"/>	

2. Enter the new checklist entry (e.g., “Travel receipts”).
3. Click the “Done” button. The checklist updates and the “Edit Document Checklist” window closes.
4. Click the “Invite” button in the “Invite Clients to Use Link” window.



The invitation with the checklist is sent to the client.