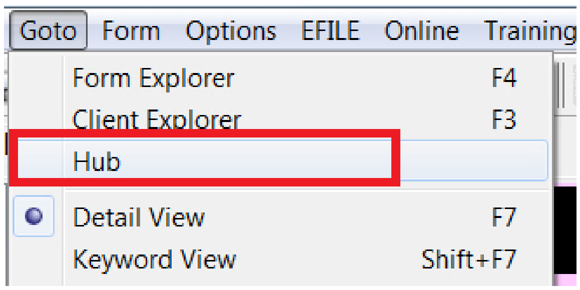
Using Checklists in Hub

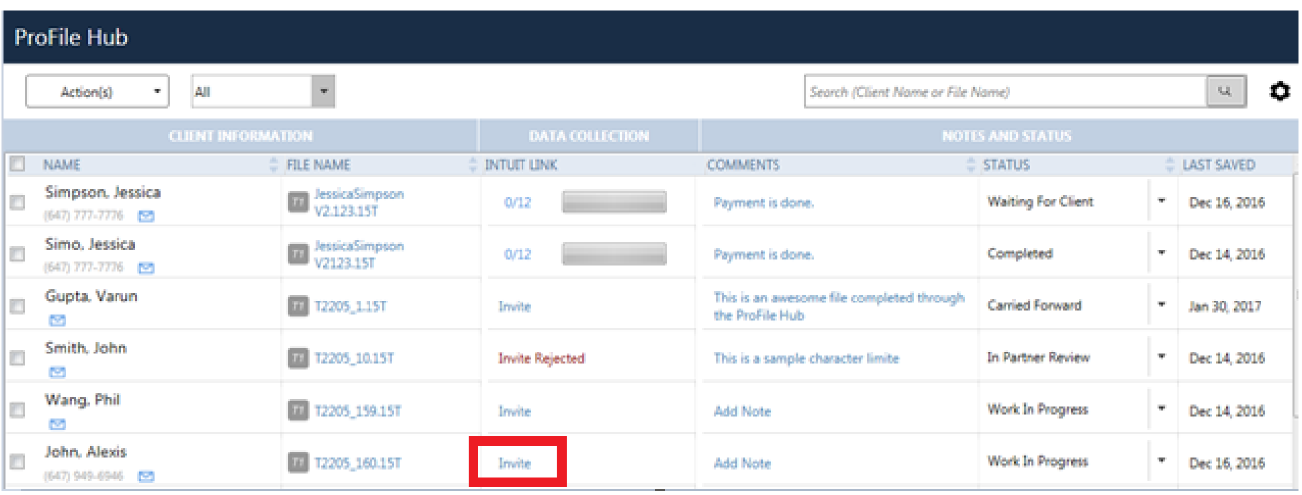
Hub allows users to maintain a checklist of tasks and/or requests assigned to a client. This is an automatically generated list based on your client's prior-year return that can be added to or changed as needed.

Reviewing a Checklist

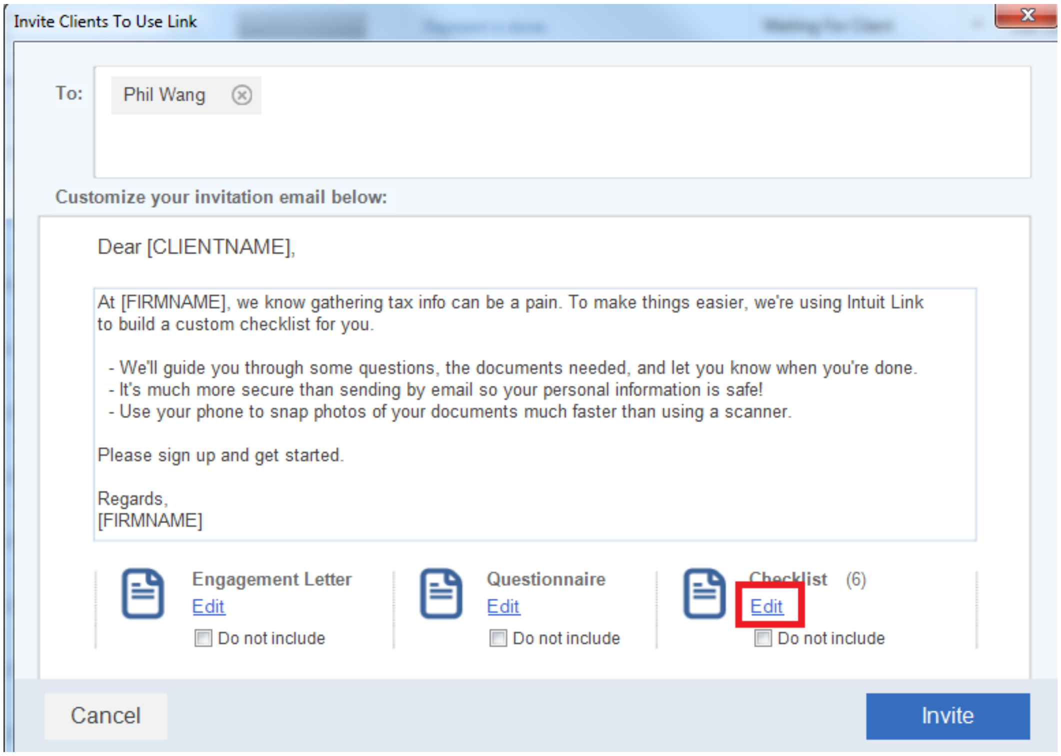
1. Open the ProFile application.
2. Select the "Hub" option from the "Goto" menu in the top toolbar.



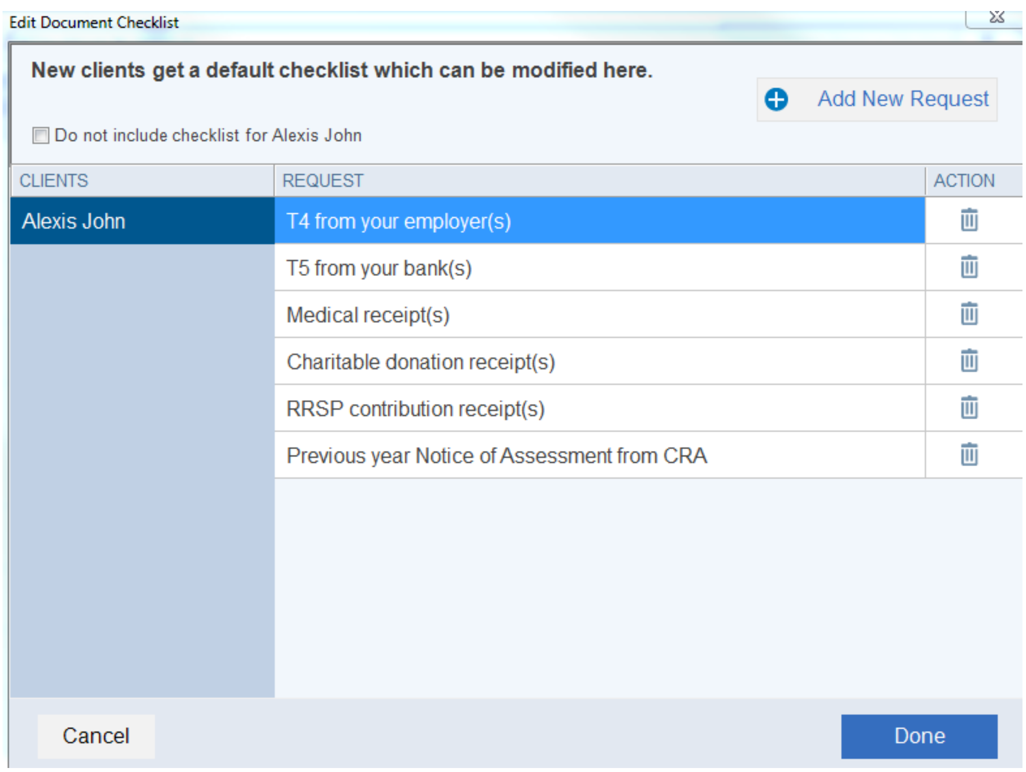
3. Hub opens, displaying a list of clients Identify the client to whom you want to create a checklist for (e.g., "John, Alexis"). Click the "Invite" button associated with the client.



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.



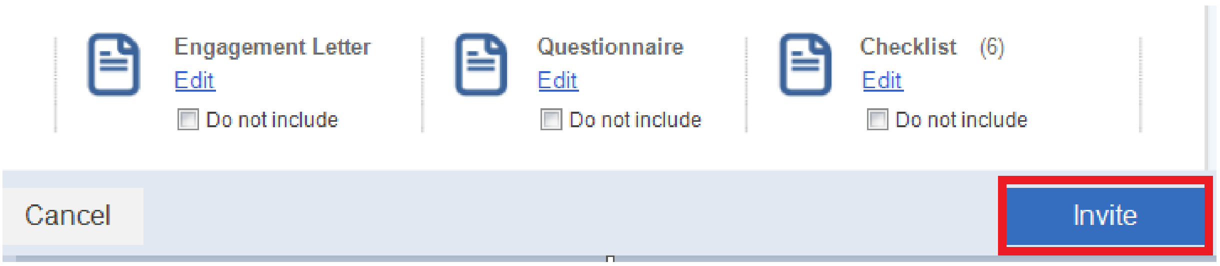
Deleting an Existing Checklist Entry

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.

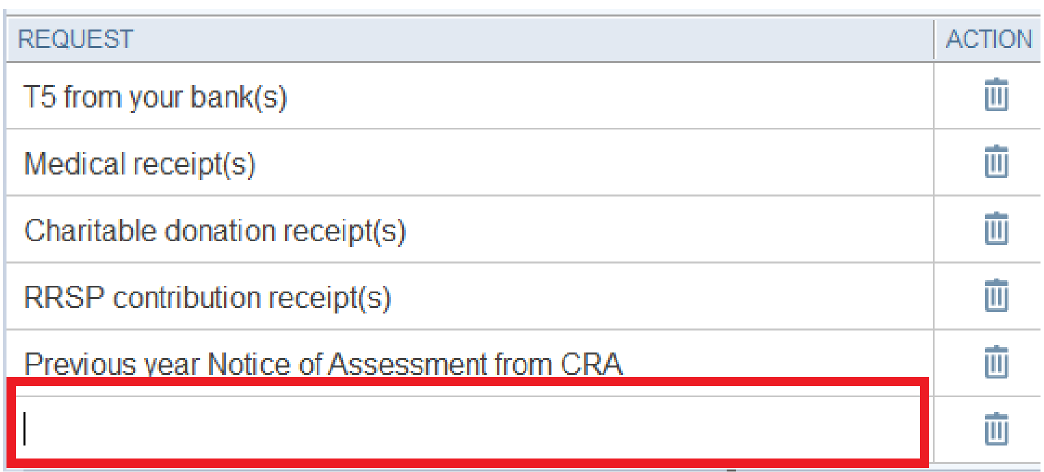
3. Click the “Done” button. The checklist updates and the “Edit Document Checklist” window closes.
4. Click the “Invite” button in the “Invite Clients to Use Link” window.



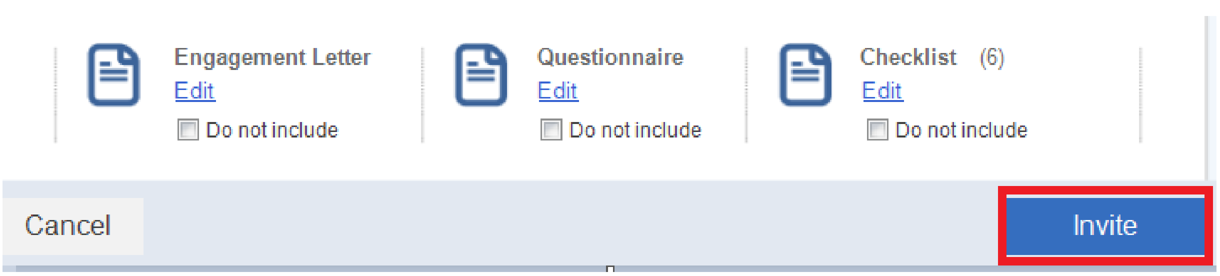
The invitation with the checklist is sent to the client.

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.



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.