

Jackson Hewitt Tax Service

~Daily Announcement~

Tuesday, January 12, 2021

Learning Group Announcement

Action Required - NEW! Reduced Front Office Printing (FOP)

Would you and your clients like to print 10+ pages rather than 40-80+? Would you like to save time by making less trips to the printer to retrieve documents and having less paperwork to assemble and distribute? Would your clients prefer to receive their documents electronically instead of paper copies – especially during a pandemic?!

If you've been practicing with the ProFiler Practice Scenarios you've already noticed a new question in the Personal Information section of ProFiler. Use it to promote the value of using MyJH to receive documents electronically rather than paper copies in the office.

Here's How it Works:

ProFiler question #25018 has three versions based on the client's MyJH status. For example, the question below appears for clients who do not have a MyJH account:

I don't see that you've set up a MyJH account. MyJH is a web-based tool you can use to share and store documents, make appointments and communicate with our office. We can drastically reduce the amount of paperwork that prints if you create a MyJH account. Would you like to create your account now, from your phone, to take advantage of this reduced printing option and access your documents electronically at your convenience through MyJH?

Q:

Preparer – Help client create a MyJH account, using their own device, and authenticate.

A:

Here's how to instruct clients based on their MyJH account status:

Client's MyJH status:

Has an active MyJH account 

Has a MyJH account, but it's inactive 

Does not have a MyJH account 

Instruct them to take advantage of reduced FOP and:

Sit back and enjoy all the benefits and advantages of having a MyJH account.

Login to their account on their mobile phone* and follow the prompts to accept the terms and conditions, etc.

Use their mobile phone* to create a MyJH account. Clients can use the various QR codes on the signage throughout the store or go to JacksonHewitt.com

***Note: Clients must use their mobile phone. They must not use office computers to complete this task.**

IMPORTANT: If you record "NO" to question #25018 **ALL** paperwork will print so encourage clients to at least try to set up a MyJH account.

If there is an issue setting up or verifying their account, or they don't set up their account, question #19319 will appear downstream in ProFiler. (See below.)

Answer "Yes" to this question and about 40+ pages will print rather than 80+.

Preparer – Answering No to this question will take you back to the Receipt, to allow the client to log into their MyJH to enable this feature. Once enabled, continue with the interview.

Q: The client indicated earlier they wish to reduce the amount of paperwork that prints and access documents electronically, but the client hasn't logged into their MyJH, from their phone, to enable this feature.

Do you wish to continue with the printing of the front office paperwork?

A:

Record "Yes" to ProFiler Q#: 19319
They won't be able to use MyJH, but 40+ pages will print rather than 80+!

Help Clients Set up a MyJH Account:

For more specific details, refer to the **MyJH Job Aid** on the Learning Center.

Contact/Source:

Learning Group

Jackson Hewitt Tax Service

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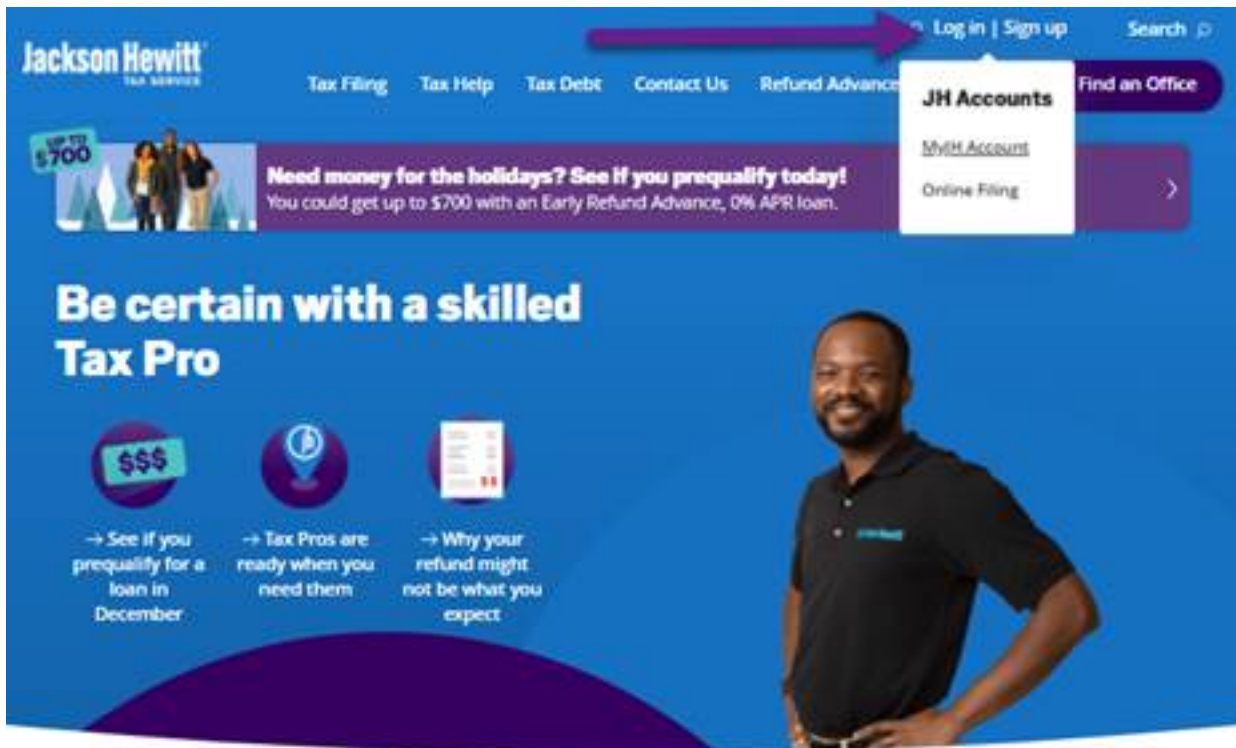
Monday, December 21, 2020

Operations Announcement

Preparer Tip - MyJH and Reduced FOP for NEW Clients – Don't Miss this Critical Step!

Many clients new to Jackson Hewitt would like to enjoy the benefits of a MyJH account, including reduced Front Office Printing (FOP.) Please remember for our NEW clients, it's a 4-step process:

1. Clients navigate to JacksonHewitt.com on their own device and choose to Login; they create their MyJH account.



Create an Account

First Name

Last Name

Username

Recommendation: Please avoid using your email address or personal information such as SSN, first and last name, etc.

2. During account creation, new clients agree to the consents.

Mobile Phone Number

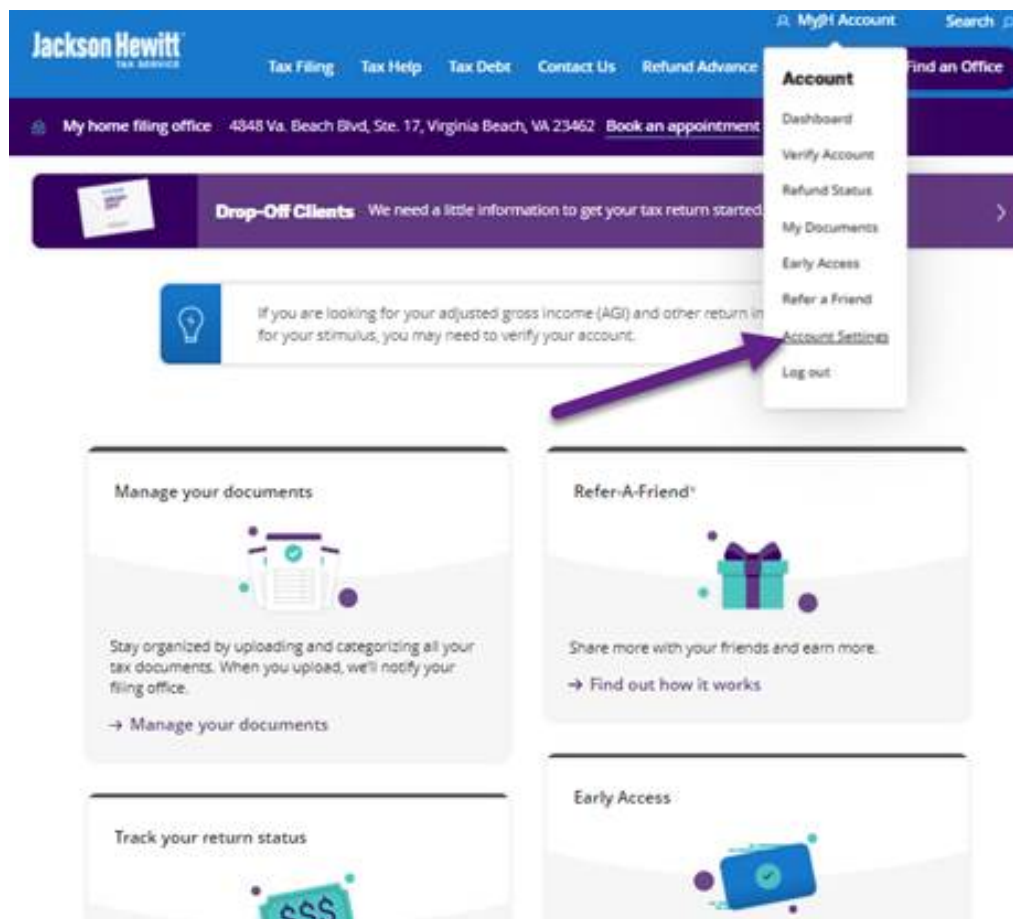
☒ I have reviewed and agree to the terms of the [Disclosure and Consent to Electronic Communications](#) and the [Terms of Use](#). I also confirm that I have reviewed the [Privacy Policy](#).

☐

[Create account](#)

3. Next, clients will need to verify their account information. Clients will receive an email at the email address used during account creation. The client must click the link to verify or type in the code to they confirm their account.

4. Next, new clients MUST “confirm their identity” by entering their social security number in the Account Settings. Until this final step is complete, ProFiler will not recognize the client in your office as the same client with this new MyJH account.



Account Settings

Account

Username

E-mail address [Edit](#)

Password [Edit](#)

Security Questions Group 1 [Edit](#)
What is your mother's maiden name?

Security Questions Group 2 [Edit](#)
In what city were you born?

Security Questions Group 3 [Edit](#)
What is your father's middle name?

Mobile Phone [Edit](#)

Alternative E-mail Address [Edit](#)

Social Security Number [Edit](#)

[Cancel](#)

[Save Changes](#)

Contact/Source:

Operations Directors