Techvio Taxes Chatbot Dialog

Here are some common intents for the chatbot based on the previously mentioned material:

1. Tax Filing Intent: This intent will be triggered when the user wants to file their taxes and will provide information about the tax filing process, required documents, and important deadlines.

2. Refund Intent: This intent will be triggered when the user wants to know about their tax refund status, estimated refund amount, and when they can expect to receive their refund.

3. Payment Intent: This intent will be triggered when the user owes taxes and wants to know about payment options, deadlines, and penalties for late payment.

4. Deductions Intent: This intent will be triggered when the user wants to know about tax deductions they may be eligible for, such as charitable donations or mortgage interest.

5. Audit Intent: This intent will be triggered when the user is concerned about being audited by the IRS and wants to know what to do if they are audited or how to avoid an audit.

6. General Tax Information Intent: This intent will be triggered when the user has general questions about taxes, such as tax brackets, tax credits, and other tax-related topics.

7. Account Access Intent: This intent will be triggered when the user needs help accessing

their account or has questions about their account information.

8. Customer Support Intent: This intent will be triggered when the user needs help with a technical issue or has a question that is not related to taxes specifically. This intent will redirect the user to the customer support

Chatbot dialogue intent flow

Sure, here is a sample chatbot dialogue based on the common intents and utterances for tax filing and tax refund questions:

User: Hi, can you help me with my tax filing?

Chatbot: Sure, I'd be happy to help! What can I assist you with specifically? User: I'm not sure which tax form I need to use.

Chatbot: I can definitely help with that. Do you have income from a job or any other sources of income?

User: Yes, I have income from my job.

Chatbot: In that case, you will need to file a Form 1040. Would you like me to send you a link to download the form?

User: Yes, please.

Chatbot: Here is a link to download the Form 1040: [insert link]. Let me know if you need any further assistance.

User: Thanks. How do I know if I'm eligible for a tax refund?

Chatbot: If you paid more in taxes than you owed, you may be eligible for a tax refund. Have you already filed your tax return?

User: Yes, I have.

Chatbot: Great. You can check the status of your tax refund on the IRS website using the "Where's My Refund" tool. Do you want me to send you a link to the tool?

User: Yes, please.

Chatbot: Here's the link to check your refund status: [insert link]. Let me know if you have any other questions.

User: Can I claim deductions on my tax return?

Chatbot: Yes, there are various deductions you can claim on your tax return. Some common deductions include mortgage interest, charitable donations, and medical expenses. However, it's best to consult with a tax professional to determine which deductions you're eligible for.

Would you like me to connect you with a tax professional? User: Yes, that would be helpful.

Chatbot: Great. I can connect you with a tax professional from our team who can assist you further. Can you please provide your name and contact information so they can reach out to you?

User: Sure, my name is John and my email is john@gmail.com.

Chatbot: Thank you, John. A tax professional from our team will be in touch with you shortly. Do you have any other questions I can assist you with?

User: No, that's all for now. Thank you!

Chatbot: Your welcome! Don't hesitate to reach out if you have any further questions or concerns. Have a great day!

Sure! Here's an example chatbot dialogue for common tax filing and tax refund questions: Bot: Hello! I'm a tax chatbot. How can I assist you today?

User: When is the tax filing deadline?

Bot: The tax filing deadline is typically April 15th, but it may vary depending on the tax year. Have you started preparing your tax return yet?

User: How can I file my taxes?

Bot: There are several ways to file your taxes, including online tax preparation software, working with a tax professional, or completing the forms by hand and mailing them to the IRS. Which option would you like more information about?

User: Can I file for an extension on my tax deadline?

Bot: Yes, you can file for an extension if you need more time to prepare your tax return. You can request an extension by filing Form 4868 with the IRS, but keep in mind that it only extends the deadline for filing your tax return, not the deadline for paying any taxes you owe.

User: When will I receive my tax refund?

Bot: The timing of your tax refund will depend on several factors, including how you filed your tax return, whether you opted for direct deposit or a paper check, and how busy the IRS is during tax season. Typically, you can expect to receive your refund within 21 days of the IRS accepting your tax return, but it could take longer.

User: How can I check the status of my tax refund?

Bot: You can check the status of your tax refund by using the "Where's My Refund?" tool on the IRS website. You'll need to provide your Social Security number, filing status, and the exact amount of your expected refund.

User: Can I get my tax refund faster?

Bot: If you're looking to get your tax refund faster, you may be able to opt for direct deposit rather than a paper check. This can speed up the refund process by a few days. Additionally, some tax preparation software may offer a refund advance program that can provide you with a portion of your refund sooner. Keep in mind, however, that these programs may come with additional fees

live chat canned responses for the most common tax filing and tax Refund questions a client asks during tax season

# **Email and Live Chat Canned Responses for Tax Filing and Tax Refund Questions:**

**Question: When is the tax filing deadline?**

● Answer: The tax filing deadline for individuals is April 15th of each year. However, if you need more time to file, you can request an extension until October 15th.

# **Question: When can I expect to receive my tax refund?**

● Answer: The timing of your tax refund depends on a few factors, including how you filed your return and how you chose to receive your refund. Generally, you can expect to receive your refund within 21 days of filing your return, if you filed electronically and chose direct deposit.

# **Question: How can I check the status of my tax refund?**

● Answer: You can check the status of your tax refund using the "Where's My Refund?" tool on the IRS website. You will need to enter your Social Security number, filing status, and refund amount to check the status.

# **Question: Do I need to pay taxes on my unemployment benefits?**

● Answer: Yes, unemployment benefits are considered taxable income and must be reported on your tax return.

Question: How do I report cryptocurrency on my tax return?

● Answer: Cryptocurrency is considered property for tax purposes and must be reported on your tax return. You will need to report any gains or losses from cryptocurrency transactions.

Question: Can I deduct charitable donations on my tax return?

● Answer: Yes, you can deduct charitable donations on your tax return if you itemize your deductions. You will need to have documentation of your donations, such as receipts or cancelled checks.

# **Question: What forms do I need to file my taxes?**

● Answer: The forms you need to file your taxes depend on your individual tax situation. Most individuals will need to file Form 1040. You may also need to file additional forms and schedules based on your income, deductions, and credits.

# **Question: How can I request a tax extension?**

● Answer: You can request a tax extension by filing Form 4868. This will give you an additional six months to file your tax return, until October 15th. Note that an extension to file does not extend the deadline to pay any taxes owed.

# **Question: What do I do if I made a mistake on my tax return?**

● Answer: If you made a mistake on your tax return, you will need to file an amended return using Form 1040-X. You should file an amended return if you need to correct your filing status, income, deductions, or credits.

# **Question: How do I pay my taxes?**

● Answer: You can pay your taxes online using the IRS website, by phone, by mail, or in person. You can pay with a credit card, debit card, or by electronic funds withdrawal. Note that there may be fees associated with paying with a credit or debit card.

live chat canned responses for the following: Refund Estimate wait time, keep receiving emails for duplicate request; system maintenance updates, request for Drivers License and social security card, account pending due to missing information, website errors, missed communication

Refund Estimate Wait Time

Response: Thank you for your query. Our refund estimate wait time is currently 48-72 hours due to the high volume of requests. We appreciate your patience.

Keep Receiving Emails for Duplicate Request

Response: Thank you for contacting us. We apologize for the inconvenience caused. Please note that our system may send multiple emails in case of duplicate requests. Kindly disregard any duplicate emails you receive.

System Maintenance Updates

Response: Thank you for your query. Our system is currently undergoing maintenance, and some features may be temporarily unavailable. We apologize for the inconvenience and appreciate your patience.

Request for Driver's License and Social Security Card

Response: Thank you for contacting us. In order to verify your identity, we require a copy of your driver's license and social security card. Please upload these documents through your account dashboard or email them to us at [email address].

Account Pending Due to Missing Information

Response: Thank you for reaching out to us. Your account is currently pending due to missing information. Please provide the required information through your account dashboard or email it to us at [email address]. Once we receive this information, we will process your account promptly.

Website Errors

Response: Thank you for bringing this to our attention. We apologize for the inconvenience caused by the website error. Our team is working to resolve the issue as soon as possible. Thank you for your patience.

Missed Communication

Response: Thank you for your message. We apologize for any missed communication on our end. Please let us know what information you want.

Account registration Walkthrough:

User: Hi, I would like to file my taxes. Can you help me with that?

Techvio: Sure, I can help you with that I have sent you an email To create an account, please click the link and create a password.

User: Okay, I've entered my personal information. What's next?

Techvio: Great! The next step is to complete your basic tax information. This includes your filing status, Social Security Number, taxes paid, and other relevant information about you and any dependents you may have.

User: I've completed my basic tax information. What's next?

Techvio: The next step is to complete the current year questionnaire. This will involve answering questions related to your income, deductions, credits, investments, and any other relevant information. It also gives you a place to leave information you may want us to know about your file.

User: Okay, I've answered the questions. What's next?

Techvio: The next step is to read and understand the engagement letter, and agree to the terms laid out by the professional tax preparer.

User: Alright, I've read and understood the engagement letter. What's next?

Techvio: The next step is to upload your financial documents and tax organizer to your 1040 account. This will give your preparer all the necessary information to complete your return.

User: I've uploaded my documents and organizer. What happens now?

Techvio: Your tax preparer will now work on your return by calculating the taxes owed and refund or balance due. Please up to 72 hrs to receive an email of your summary.

User: Okay, how will I know when my return is completed?

Techvio: We will notify you when your return is complete. At that time, you will be asked to sign form 8879 to authorize the IRS to directly deposit any refund due.

User: What if I owe taxes instead of getting a refund?

Techvio: If you owe taxes, you will have to make a payment at the time of filing. You will receive an invoice in your account after you agree and sign.

User: Once my return is completed, what do I do with it?

Techvio: Once your return has been completed, You will be directed to the Track my refund page where you have instructions on checking your refund status. You can also download a copy of your tax return from your account.

User: Great, I think I've completed everything. Thanks for your help!

Techvio: Congratulations! You’re done! Your return is being processed and you can expect to receive your Refund Summary Estimate Soon. If you have any further questions or concerns, don't hesitate to reach out to us

List the 20 most common questions a tax client wants to know when filing their taxes?

1. What is my total taxable income?

2. What tax rate will I be paying?

3. What deductions and credits can I claim?

4. Do I qualify for any special tax deductions?

5. How do I claim my dependents?

6. What tax forms do I need to file?

7. How do I report foreign income?

8. When is my tax filing deadline?

9. How do I know if I need to pay estimated taxes?

10. What is the difference between a W-2 and 1099 form?

11. How do I calculate capital gains taxes?

12. Do I need to file a state tax return?

13. How do I report business income on my taxes?

14. What should I do if I need to amend my tax return?

15. How do I know if I qualify for the Earned Income Credit?

16. How can I avoid underpayment penalties?

17. What should I do if I receive an IRS audit notice?

18. How do I report income from rental property?

19. How do I know if I'm eligible for the child tax credit?

20. What are the most important changes to the tax code this year?

ANSWERS:

1. Your total taxable income is the total of your gross income (wages, salary, interest, dividends, etc.) minus any deductions, credits, or exemptions that you’re eligible for.

2. Your tax rate will depend on your filing status and income level. Generally, the more you

earn, the higher your tax rate.

3. Deductions and credits that you may be able to claim include the standard deduction, itemized deductions, and credits such as the Child Tax Credit, Earned Income Tax Credit, and Education Tax Credits.

4. Depending on your circumstances, you may qualify for special deductions such as the mortgage interest deduction, the self-employment tax deduction, and charitable contributions deductions.

5. You can claim your dependents on your tax return by listing them as exemptions.

6. Depending on your income level, you may need to file Form 1040, 1040A, or 1040EZ. You may also need to file additional forms, such as Schedule A and Schedule C.

7. To report foreign income, you need to file Form 2555/2555-EZ with your Form 1040.

8. The federal tax filing deadline is usually April 15th of each year.

9. You may need to pay estimated taxes if you are self-employed, have income from sources other than wages, or if you expect to owe more than $1,000 in taxes.

10. A W-2 form is a form you receive from an employer that reports your wages and taxes

withheld.

11. A 1099 form is a form you receive from independent contractors or other sources that reports non-wage income and taxes withheld.

12. To calculate capital gains taxes, you need to calculate the amount of your gain or loss and then determine your tax rate.

13. You may need to file a state tax return, depending on your state of residence.

14. Business income is reported on Schedule C, which is attached to your Form 1040.

15. If you need to amend your tax return, you must file an amended return using Form 1040X.

16. You may be eligible for the Earned Income Credit if your income is below a certain level.

17. To avoid underpayment penalties, you should pay at least.

**. Here are the 20 most common questions and general answers:**

**What is the deadline for filing taxes?**

**1.** **Answer: The deadline for filing taxes varies depending on the jurisdiction. In the US, the deadline is April 15th of each year, but it can be extended under certain circumstances.**

**How much money can I earn before I have to file taxes?**

**2.** **Answer: The income limit to file taxes varies depending on your filing status and age. Generally, if you earn more than the standard deduction, you're required to file a tax return.**

**What documents do I need to file taxes?**

**3.** **Answer: You will need your W-2, 1099 forms, and any other documentation that shows your income, expenses, and deductions.**

**Can I file my taxes online?**

**4.** **Answer: Yes, you can file your taxes online using tax preparation software, such as TurboTax, H&R Block, or TaxAct.**

**What is the difference between a tax credit and a tax deduction?**

**5.** **Answer: A tax credit directly reduces your tax liability, while a tax deduction reduces your taxable income.**

**How can I maximize my tax refund?**

**6.** **Answer: You can maximize your tax refund by claiming all eligible tax credits and deductions, contributing to a retirement account, and maximizing charitable donations.**

**How long does it take to get my tax refund?**

**7.** **Answer: The processing time for a tax refund varies depending on the jurisdiction, but it generally takes up to 21 days to receive a refund after filing electronically.**

**What happens if I file my taxes late?**

**8.** **Answer: If you file your taxes late, you may face penalties and interest charges on the amount owed.**

**Can I deduct my home office expenses?**

**9.** **Answer: If you work from home, you may be eligible to deduct a portion of your home office expenses, but specific rules apply.**

**How do I report income from self-employment?**

**10.** **Answer: You must report income from self-employment on Schedule C of your tax return. Can I deduct medical expenses?**

**11.** **Answer: You can deduct medical expenses that exceed 7.5% of your adjusted gross income. Can I deduct student loan interest?**

**12.** **Answer: Yes, you can deduct up to $2,500 in student loan interest paid during the year. What is the difference between a traditional IRA and a Roth IRA?**

**13.** **Answer: A traditional IRA allows for tax-deferred contributions, while a Roth IRA allows for tax-free withdrawals in retirement.**

**How do I report cryptocurrency transactions on my taxes?**

**14.** **Answer: You must report cryptocurrency transactions on your tax return and pay taxes on any gains.**

**What is the difference between a dependent and an exemption?**

**15.** **Answer: A dependent is someone who relies on you for support, while an exemption is a deduction you can claim on your tax return for yourself, your spouse, and each of your dependents.**

**Can I deduct charitable donations?**

**16.** **Answer: Yes, you can deduct charitable donations made to qualified organizations. Can I deduct mortgage interest?**

**17.** **Answer: Yes, you can deduct mortgage interest on your primary residence and a second home.**

**What is the Alternative Minimum Tax (AMT)?**

**18.** **Answer: The AMT is a tax system that ensures high-income earners pay a minimum amount of tax, regardless of deductions and credits.**

**Can I deduct business expenses?**

**19.** **Answer: Yes, you can deduct business expenses that are ordinary and necessary for your trade or business.**

**How can I reduce my tax liability?**

**20.** **How can I reduce my tax liability?**

**21.** **Answer:**

**You can reduce your tax liability by claiming all eligible tax credits and deductions, contributing to a retirement account, maximizing charitable donations, and taking advantage of tax-deferred investment options such as 401(k) or IRA. It's essential to consult a tax professional to determine the best strategies for your specific tax situation.**

Customer Service Script & Procedures

All initial questions and concerns should filter through the FAQ section

Level of Assistance:

Level 1- General Filing Questions/Invite Link/registration help

Includes what’s on the FAQ sheet- resources will be located in the slack resource room and in the google doc

Level 2- Inquiries, referral disputes, consultation requests

Level 3- Irate clients, refund dispute, IRS notice- form upload required

Jahari is the only one authorized to handle level 2 & 3 questions. Who to ask for client resolutions:

Jahari- TUES/WEDS/THURS/FRI (10am-10pm)

\*Unavailable, submit a ticket via slack (6-8pm est)

Transferring call, or taking a message, putting someone on hold

1. Thanks for reaching out! Right now, I’m not the best person to help with this. I’m going to connect you to my colleague [Name] in the [Name of the Department] Department.

2. Do you mind waiting a moment while I explain to [Name] what you’ve just explained to me?

3. I appreciate you explaining that to me. I’m going to connect you to our [Name of Team] I’ll let them know what you’re reaching out about.

4. I just need to check something. Do you mind if I put you on hold for a moment?

5. Great question! I want to pull up your account details to check it out. Can I put you on hold? 6.We need just a bit more information before getting this resolved. Do you mind sending along [any additional information that you need]?

7.Happy to help with this! I just need a bit more information from you. Please enter [any additional information] into your account settings at [link].

9. Do you mind confirming your billing address for me?

10. Sure thing! Just to confirm, can you share the last four digits of your credit card and the expiration date?

11. Yep! Happy to get this going. Do you mind sharing the zip code that you entered with this order?

12. Happy to help out with this. Do you mind sending me the account number that you see

at the top of your bill?

13. I hear you. That stuff can be hard to find. If you don’t have access to that, would you mind providing [other verification information]?

Here are some examples of affirmative words to be used for live chat scripts and templates that will make customers happy.

• Great

• Wonderful

• Excellent

• Absolutely

• Definitely

• Fantastic

• Assure

• Certainly

• Amazing

• Awesome

• Superb

• Good

Here are some of the negative words to avoid live chat scripts and templates:

• Bad

• Never

• Terrible

• Awful

• No way

• Not at all

• Forget it

• Horrible

Greetings

Hello, welcome to “business name” thank you for visiting our website. How can we assist you? Hello, thank you for using the “business name” service. Can I help you with something?

Welcome back “customer name”. Happy to see you again. What can we do for you today?

**Apology Examples**

Apology for an issue

We’re sorry about the “issue”. Let me have a word with my manager to find out how we can fix this for you.

We apologize for the inconvenience you have faced. We’re very sorry. We will take care of the “issue” on top priority for you. Please hold patience with us.

Apology to unable to meet the request

We’re very sorry, but the free shipping offer is over for that particular region.

# **Providing alternate options**

May I request you to go through the “solutions” as a better option for the “problem”? I would like to recommend a “solution” that fits your requirements.

May I request you to provide your current billing address?

In order to process your order, please provide your credit card number, expiry date and the security code.

# **Address verification**

May I request you to verify your current residence address? Can I ask you to provide the zip code of the current address? Asking for personal information

Can I request you to provide me with the account number listed on your generated bill? May I request you to provide your current billing address?

In order to process your order, please provide your credit card number, expiry date and the security code.

Please provide me with your date of birth and social security number to proceed.

# **Irate customer**

• I hear you. I’m terribly sorry for the frustration and inconvenience this has caused. I’ll be sharing your feedback with [name of the department e.g., finance team, warehouse].

• I understand why you feel upset. I appreciate you bringing this to our attention. So, you have problems with [product] and now you can’t [repeat what the customer said], is that correct?

• I know it is frustrating when you receive a faulty product. Could you describe exactly what’s wrong?

• I understand why you’re upset. Can you please tell me a little more about the problem?

please?

# **Learn more about dealing with angry customers in five easy steps.**

Inactive user

• I can see you’re away for quite some time so I’m closing our chat session now. But my colleagues and I are here should you have further questions. Have a good day!

• Hey [customer’s name]! I haven’t heard from you for a while. Don’t hesitate to drop me a line if you need my help in the future.

• Thanks for stopping by! Should you have any other questions, please, let me know. Thank you

• Thanks for taking an interest in our brand! Have a nice day and hope to see you soon.

• No worries. I’m always happy to assist you. Don’t hesitate to drop me a line if you need my help in the future.

• We appreciate your opinion and look forward to seeing you soon here.

• Thanks for contacting our support team! I’m glad I could help. Is there anything else I can help you with?

• Thank you for chatting with us. I’m always happy to help.