

# The Ohio Benefit Bank™

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## Tax Operations Guide

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# Section One

## Engaging Volunteers

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### Introduction

The Ohio Benefit Bank simply could not exist without the hard work of volunteers all around the state of Ohio. These volunteers donate their time to help organizations like yours assist clients with completing applications for work support programs and filing their federal and state taxes at no cost to them. If you'd like to maximize your OBB site's impact this year, it's important that you spend time engaging your volunteers. Before you begin it's important to understand why someone would want to volunteer with the OBB.

### Why Volunteer with the OBB?

Individuals donate their time for a variety of reasons. Most people are looking for a way to use their existing skill set to give back to their community but there's often a specific reason they chose to volunteer with the OBB. Here are a few of the most common reasons:

- They know someone or they themselves have been forced to make tough decisions between putting food on the table, paying medical bills, and paying household utilities
- They want to help Ohioans save money by not having to pay to file their taxes
- They want the satisfaction that comes with telling someone they'll be getting a tax refund
- They want to give their clients hope for the future

### In This Section

This section will focus on your most important asset, your volunteers. How will you recruit new volunteers? What roles do you need to fill? How will they be trained? By investing in your volunteers you are increasing your capacity to make a difference in your community this tax season!

## Roles

Before you begin engaging your volunteers it's important to understand the various roles you'll need to fill to operate your tax site this year. Possible roles could include:

- Appointment recorder - *This person is responsible for answering phone calls and responding to emails with the goal of scheduling client appointments*
- Setup and tear-down staff - *These individuals assist with setting up tables, chairs, computer equipment, and more*
- Intake person - *This person is responsible for signing clients in and can even create client logins to speed up the time spent with their counselor*
- Host/Hostess - *Like a hostess at a restaurant, this person picks the client up from the waiting area, takes them to the available counselor, and introduces them*
- Resource person - *If your organization has additional resources of which clients can take advantage, it's important to assign someone to share that information*
- Tax counselor - *This person is responsible for completing required training and assisting clients in filing their federal and state income taxes*
- Site administrator - *This person is in charge of OBB operations for your organization*



## Recruiting Volunteers

As previously mentioned, your volunteers are your most important asset for operating a tax site. Staff members will be playing an important role, but your volunteers add the extra man-power you need to make the biggest possible impact.

### Incentives for Volunteers

Consider offering incentives. While most volunteers are willing to give their time without rewards, incentives can be a nice way to thank volunteers and keep them coming back.

Incentives could include:

- Public recognition
- Volunteer/Counselor of the week award
- Breakfast and coffee in the morning
- Lunch for volunteers
- T-shirts
- Gas cards
- Gift cards
- Coupons



### Places to Recruit

- *Your Agency - Tap into your current volunteer pool and see if those who have volunteered for other events in the past would be willing to help.*
- *Volunteer Fair - Communities often host local events where you could host an informational booth and spread information about both the free tax service and the volunteer opportunity.*
- *United Way - This is a great resource for Tax Clinics! Contact your local United Way office to see if they can reach out to their volunteer base, post a message or advertisement on their website, and help with marketing. United Way is a high-profile organization throughout the state and it is great to tap into the positive brand associations people have about the organization.*
- *College Students - Reach out to local universities, as many students look for volunteer experience to build their resumes. Look for business or social clubs to connect with, or fraternities or sororities that provide community service projects. Ask professors who teach business, accounting, or finance classes if they will forward the opportunity to their students. They may also be willing to provide extra credit or externship credits to students who volunteer. Ohio Campus Compact (OCC) places AmeriCorps members at college campuses across Ohio who can help with connecting you to potential volunteers.*
- *High School Students - Many high schools require community outreach hours for graduation. While they might not be able to be counselors, they are an excellent resource for setting up and tearing down!*

- Seniors - *Connect with your local Senior Center or AARP to see if there are retired accountants who might be interested. Also look for a local RSVP group that could help for the day. RSVP is a volunteer program through the Senior Corps branch of the Corporation for National and Community Service (CNCS).*
- Churches - *See if local churches mind if you put a notice in their weekly bulletin or a flier on their website or bulletin board.*

## **Volunteer Sharing**

Volunteer sharing is an emerging practice where volunteers of one organization agree to donate time to another partner organization. You can use the site locator to find other OBB sites in your area who may be willing to donate their time to your organization. Consider sending them an email or calling them to ask for support. If they agree to help, take time to think about ways in which you can use the partnership to increase your site's capacity. Perhaps experienced counselors from the partner organization could be paired with your new volunteers to share best practices.

## **Online Resources**

Many online tools exist that can help with your volunteer recruitment efforts. The following websites are a good place to start:

- <http://www.volunteermatch.org/>
- <http://www.idealists.org/>
- <http://www.allforgood.org/nonprofits>
- Local community calendars or county websites may also have volunteer sections

## Training Volunteers

Typically volunteers are looking to use their existing skill set to make an impact in their community. That said, training is a very crucial step in preparing your tax site. For example, a volunteer may come prepared to use their computer skills but will need to be trained to use The Benefit Bank online service. Training ensures your volunteers understand their role and are prepared to fill that role when the time comes.

### Tax Counselor Training

The Ohio Benefit Bank (OBB) recently changed the way we conduct counselor training. Now, potential and current counselors can access and complete their OBB training at a time and location that is convenient for them via our new online, self-directed trainings. The new trainings are filled with interactive activities, videos, and up-to-date program information that will prepare trainees for success as an OBB counselor. To get started with training simply follow the steps below:

- Visit the counselor support website, <http://support.ohiobenefits.org/>
- Click 'taxes'
- Click 'training'

One way to motivate your volunteers to complete their tax counselor training is to host a group training. Individuals are invited to a computer lab or another space with internet access at a specified time. The group then works through the training independently (headphones will be required). When it comes time to complete the scenarios at the end of the training individuals can pair up and role-play. While one person assumes the role of counselor another assumes the role of the client to simulate the process of completing a tax return. The most important part is that each counselor complete their own tax counselor certification test.

### Training for Other Roles

Even though some roles may seem like they do not require training it's important to at least cover the basic tasks each person will need to complete. Activities like setting up tables aren't very complicated but if done improperly the volunteers safety may be put in jeopardy. Also, some volunteers may be shy to ask for help even if it's needed. Covering these basic tasks may prompt them to ask the questions they otherwise might not have asked.

## Volunteer Appreciation

### Thank You Letters

Remember to send written thank you letters to all those who helped your OBB site operate smoothly – whatever their part. Everyone who helped should receive a thank you:

- Volunteers
- Donors
- Staff who may have helped



### Appreciation Lunch for Volunteers

The majority of your support probably came from a large volunteer base. If you have the resources, consider showing your appreciation by holding a lunch or social event. This does not have to be a big event – cake and punch can be just as effective. You can also provide a small gift or token of your appreciation.

Give a recap on how many clients were served and the refund total for the season. Print off thank you certificates. Track how many hours each volunteer committed, and acknowledge those who gave the most time. If you received donations of prizes for volunteers, you could additionally recognize those who served the most clients or made a specific impact upon the day.





# Section Two

## Promoting Your Services

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### Introduction

Every site within the OBB network is unique. Your clients are unique, your services are unique, and so your marketing efforts should be, too. Your approach should be based on a number of things, including:

- Your organization's capacity to assist clients with tax filing
- Your organization's existing partners
- Population density
- Population demographics
- And more

### Why Promote Your Services?

Many OBB sites, like food pantries, offer essential services and don't need to do very much direct marketing. In the case of a food pantry, clients understand that when they can't afford to purchase food they need to head over to their local pantry. They may not be aware that they may also be able to file their income taxes for free while visiting a food pantry within the OBB network.

By becoming an OBB tax site, you've opened the door to providing an additional service. In order to get the word out about this newly available service you'll need to do some marketing.

### In This Section

This section will focus on ways in which you can promote your OBB services. What materials are available? What kind of strategies can you take? By investing your time in promoting your new income tax preparation services you'll be able to maximize your site's impact in your community!

# Ordering Marketing Materials

The Ohio Association of Foodbanks provides free, full-color marketing materials to all OBB sites and supporters. Click “Marketing Order Form” on the home page of [support.ohiobenefits.org](http://support.ohiobenefits.org) to place an order for marketing materials. Using the marketing order form you can order:

- Promotional items like stickers, decals, and name tags
- Items for daily OBB operations like client login cards, QuickCheck cards, and document envelopes
- Client outreach items like flyers, posters, and door hangers

To order marketing materials:

1. On the home page click “Outreach,” then click “Marketing Order Form.”
2. Enter the quantity needed then click the blue “Add to Cart” button for each item needed.
3. To view additional pages of materials click the page numbers at the bottom of the Order Form.
4. To check out, click “View Cart” then click the “Checkout” button.

### Marketing Order Form


To order full-color marketing materials simply select the items you need, review your shopping cart, and checkout. If you have a question about the status of your order, please email us at [contactobb@ohiofoodbanks.org](mailto:contactobb@ohiofoodbanks.org).

1 item(s), Total: \$0.00 [View Cart](#)

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You are here: [Marketing Order Form](#)


Bank Your Full Refund



Your tax refund is your money.  
So why pay for something that already belongs to you?  
Don't give part of your tax refund away. E-file your federal and state taxes with us, free. Bank your full refund.

Description:  
8.5" x 11", color  
25 flyers per package  
Qty:  [Add to Cart](#)

Bank Your Full Refund | Spanish



Su devolución tributaria es su dinero.  
¿Para qué pagar por algo que ya es suyo?  
No regale ninguna parte de su devolución. Presente electrónicamente sus impuestos federales y estatales con nosotros, gratuitamente. Reténgala bien.

Description:  
8.5" x 11", color  
25 flyers per package  
Qty:  [Add to Cart](#)

Document Envelope

**MY BENEFITS INFORMATION**

Description:  
10" x 13", black and white  
50 envelopes per package  
Qty:  [Add to Cart](#)

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Your Shopping Cart

[Back to the Marketing Order Form](#)

Product	Quantity	Remove
Bank Your Full Refund	1	<a href="#">Remove</a>

[Clear Cart](#)
[Checkout](#)

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### Checkout

\* Required

First Name \*

Last Name \*

Email Address \*

Company

Work Address \*

City \*

State \*

Zipcode/Postcode \*

[Submit](#)



## Distributing Marketing Materials

There are many ways to market your event. The trick is to be creative! Here are some ideas to get you started.

### Flier Distribution

This is one of the best ways to spread the word about your OBB tax services. Identify local businesses and centers that serve low- to middle-income residents that will either let you post a flier on their boards or pass along your information to their clients.

### Press Releases

Sending a press release to your local newspaper or media organization can be a simple and free way to let the community know about your event. Media organizations print them so long as they have an opening - so send them in early! A template can be found at <http://ohiobenefits.org/taxclinic/press-release.doc>.

### Media Advisory

Alert the media about your services and any events you may be planning, as they may choose to send someone to cover it! A sample template can be found at <http://ohiobenefits.org/taxclinic/media-advisory.doc>.

### Newsletter

Let your current clients and sponsors know about your income tax preparation services by including a message in your agency newsletter. Also think about sending information to local churches and organizations to include in their weekly or monthly newsletters. A sample template can be found at <http://ohiobenefits.org/taxclinic/newsletter-insert.doc>.

### Community Calendars / Meetings

Counties often have online community calendars where you can post any events you have planned. You can find these by running an Internet search. Enter search terms such as, "Summit County Community Calendar." Also, if you attend a coalition meeting or event, bring a stack of fliers with you.

### **Local Radio Stations**

Some local radio stations offer free public service announcement slots. Contact your local radio station and ask if there are any free or low-cost options that you can take advantage of to get the word out about your tax preparations services. A pre-recorded audio clip can be found at <http://ohiobenefits.org/taxclinickit/radio-psa-audio.wav>.

### **JFS**

Your county Job and Family Services Department is a great place to hang flyers. They might even include information in mailings they send to clients.

### **United Way or InfoLine**

Your local United Way can publicize your event on their website. InfoLines that are aware of your tax services will be able to recommend potential clients.





# Section Three

## Client Sessions

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### Introduction

Every interaction you have with your clients is important and can have an impact on whether or not they return next year to utilize your OBB tax preparation services. Although each session is different, there are steps you'll complete each time you meet with a tax client.

### In This Section

This section will focus on the steps you can take to ensure every client session is successful. Will you take appointments? If so, who will be responsible for recording client appointments? Will walk-in slots be available? Taking a client-centered approach to making these decisions will be critical for smoothly operating your OBB tax site this year!

## Appointment VS Walk-in

Before you begin providing services it's important to decide whether you would like to schedule your clients by appointment or if you will accept walk-ins – or both.

### Appointment Only Pros

- Able to screen out ineligible clients over the phone
- Know exactly how many OBB counselors/volunteers you need
- Clients come prepared, having received confirmation letters and checklists via mail & asked questions

### Appointment Only Cons

- You may experience unnecessary downtime between appointments
- Clients sent confirmation letters still may not show up and volunteers will have no one to fill the open slots

### Walk-in Pros

- Less time-consuming; no phone calls or mailers
- Less expensive; no mailers

### Walk-in Cons

- Clients may come without proper documents
- Ineligible clients may come because they were not screened beforehand
- May be overwhelmingly busy or slow

### TIPS

- See if your local InfoLine or a volunteer can help take appointments
- Consider having a separate number for appointments, as high amounts of tax calls can tie up your agency's regular phone line

## Taking Appointments

### Taking Appointments

After all the marketing you do, you may be pleasantly surprised by how many calls you receive. This can be the most time consuming part of the process, so make sure you are prepared to handle all of those calls.

### Have an Appointment Calendar Ready

If you don't have an internal system for taking appointments, consider using Google Spreadsheets. Instructions can be found at <http://ohiobenefits.org/taxclinickit/how-to-google-spreadsheets.pdf>.

### Make Time for Volunteers

Schedule a 15-minute break between clients for volunteers to take a break, go to the restroom, walk around, or just breathe between clients. If your first appointment is from 9:30am-10:30am, schedule the next appointment from 10:45am-11:45am and so on. The volunteer may choose to move on to the next appointment, but it is considerate to give them a break.



### Have a Script

Having a script helps ensure that the person taking calls provides and collects all the necessary information. A sample script can be found at <http://ohiobenefits.org/taxclinickit/phone-script.doc>.

### Reminder Packets

If your budget and time allows, send reminder packets to the client to ensure they remember their appointment and that they bring all necessary documentation to the clinic. Suggested documents for the packet include:

1. Welcome Letter with their appointment time, your contact information, and other reminders (a template can be found at <http://ohiobenefits.org/taxclinickit/appt-letter.doc>.)
2. The Benefit Bank Client Terms and Conditions
3. A Summary of the Limitations of Use
4. Federal Taxes Checklist
5. State Taxes Checklist
6. Maps/Directions to your site

## Steps to a Successful Client Session

The chart below maps the typical flow of a successful client session. It is important to complete each of the steps listed every time you assist a client in filing their income taxes with the OBB.

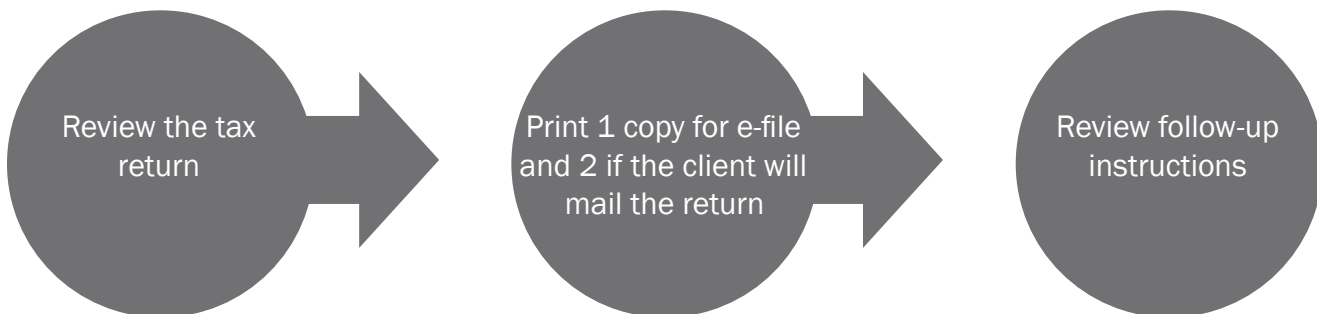
### 1. Intake



### 2. Login Process



### 3. Filing the Return









# Section Four

## Hosting Tax Clinics

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### Introduction

Your organization's tax assistance efforts do not have to be limited to your organization's normal hours of operation. One great way to serve your community is to host a tax clinic. A tax clinic is an event where organizations join together to assist their community in filing their income taxes. They can also assist with other things such as obtaining health insurance, a bank account, financial planning, and more.

### Why Host a Tax Clinic?

Most people who file their income taxes each year work during the week. They may be unable to leave work to have their taxes filed for free. Another great reason to host a tax clinic is to educate consumers. You'll be able to surround your clients with resources and representatives that can provide information about everything from health insurance to home mortgages.

### In This Section

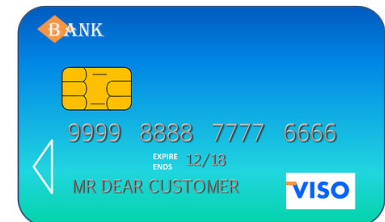
This section will highlight what it takes to host a successful tax clinic. What organizations will you invite? How will you invite them? What supplies will you need to pull off the event? By putting in a little extra planning you'll be able to host a hugely successful event and impact the lives of many!

## Creating Educated Consumers

Encourage clients to get the most out of their tax return by providing valuable resources at your Tax Clinic. Consider having a resource center and inviting representatives to provide services (not just fliers and information) at your Tax Clinic.

### Agencies to Consider

- Health Insurance Assistants - *If your event is going to occur during the Health Insurance Marketplace open enrollment period, consider inviting health insurance assistants to help clients access health insurance or answer client questions. The Ohio Association of Foodbanks operates a state-wide assister program. Call 1-800-648-1176 to see if any of our assistants would be available to attend your event.*
- Any agencies that offer IDAs - *If local agencies offer Individual Development Accounts or other retirement plans in your area, see if they can attend to sign clients up.*
- Financial Planning Services - *The Financial Planning Association (FPA) can provide a counselor to talk to clients interested in making smart money decisions.*
- Housing Associations - *Local associations may offer foreclosure prevention or financial literacy information to clients.*
- Credit Check/Counseling - *Clients can have their credit checked and receive information about improving their score by the way they use their return.*
- Credit Unions - *Ask local credit unions to bring forms for clients to open bank accounts that day and deposit their tax returns.*



**TIP:** If there isn't enough room for other agencies to have tables, collect information and make it available at a centralized table for clients to see and collect.

## Soliciting Donations

Fundraising and donations can be a great way to get your community involved in your clinic, recognize volunteers, and make the day special, even on a limited budget.

**In-Kind Donations:** This is the term for a donation of an item, good, or service rather than a monetary donation.

Consider requesting in-kind donations from local businesses. Such as:

- Bagels and coffee from local breakfast stores and coffee shops for volunteers
- Platters from local sandwich shops for volunteers
- Gift cards from local restaurants and entertainment venues to thank volunteers

### How would I start requesting donations?

A brief Fundraising Guide, including a Donation Request Letter Template, can be found at <http://ohiobenefits.org/taxclinickit/fundraising-guide.pdf>.

#### TIPS:

- Start early! Some businesses require requests to be placed so far in advance
- Make a resource map
- Don't just send in a request letter, call and make a connection! Or visit during slow times (2pm to 4pm Tuesday through Thursday)

## Event Logistics

Run through the logistics of the day to make sure you have everything you need and have contacted all necessary parties. A typical clinic could run as follows:

1. Set up tables
  - a. Consider doing the day before
2. Volunteers sign in and receive briefing
3. Setup coffee/donut table for volunteers
4. Place volunteers at their stations
  - a. Counselors at computers
  - b. Greeter/runner at sign-in table (one volunteer to do both or one of each)
5. Clients sign in
  - a. Greeter makes sure the client has the proper documents (W2s, PIN, or last year's AGI)
  - b. Greeter highlights their name on the appointment list (this will be crossed out in pen after the appointment is completed)
  - c. Greeter gives the client a copy of the Client Agreement Form
6. If they have to wait for a counselor, client goes in the waiting room
7. When counselor is ready for client
  - a. Runner gets client from waiting room
  - b. Introduces client to counselor
8. Counselor completes client's forms
  - a. Prints off their forms
  - b. E-file when possible
  - c. Goes over the follow-up steps
9. Runner picks up client and takes them to Resource Room where other services (like health insurance assisters and credit unions) may be held
10. Counselor takes a 15-minute break before runner brings them the next client

## Utilizing Self-Serve

Not all of your clients will need the assistance of your counselors. Some individuals will be perfectly capable of completing their own tax return using The Benefit Bank's Self-Serve edition. Each site within the OBB network is automatically assigned a custom Self-Serve URL. Using your site's custom Self-Serve URL, you can enable these individuals to complete their income taxes and maintain all of the activity reporting capabilities you're used to having.

### Things You Will Need

- At least one staff member that is familiar with The Benefit Bank (A trained counselor is best)
- Custom Self-Serve URL (More information in section five of this guide)
- Computers with Internet access
- Refund Calendar (with date of clinic highlighted)
- Document envelopes for clients to store their returns

**TIP:** The custom Self-Serve URL is too long and complicated to type into the browser for each and every return. Instead, it may be a good idea to create a desktop shortcut so clients can quickly begin completing their income tax returns. Below are the steps for creating a desktop shortcut.

### Create Desktop Shortcuts

*These steps will vary slightly depending on your browser*

1. Navigate to your custom Self-Serve URL
2. Create a bookmark for your Self-Serve URL
3. Click and drag the new bookmark to the desktop

Repeat these steps for each computer that you will be using

### The Process

Once everything is setup, you can use the following process to facilitate a Self-Serve session.

1. Clients who have identified themselves as being capable of completing their own return are ushered to an open computer
2. The Self-Serve facilitator asks the client if they have any questions about the Terms and Conditions of Use
3. The client opens the desktop shortcut and begins entering their information
4. The Self-Serve facilitator assists clients with answering questions and troubleshooting as needed
5. After the client completes and prints their return, the Self-Serve facilitator ensures the client knows what to expect next

## Supplies Checklist

### Counselor's Stations

- Pen
- Note pad (recycled office paper cut into four pieces and stapled at one end can also work)
- OBB counselor nametag
- Refund Calendar (with date of clinic highlighted)
- Document envelopes for clients to store their returns

### Printing Station

- Reams of paper
- Staplers
- Plain white envelopes
- Address labels for those who wish to print and mail federal and state returns

### Greeter's Station

- Volunteer Sign-in
- Client Sign-in
- Pens
- Highlighter
- Note pad
- Stack of copies of the Terms and Conditions of Use
- Appointment sheet for the day (either electronic or paper)







# Section Five

## For Site Administrators

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### Introduction

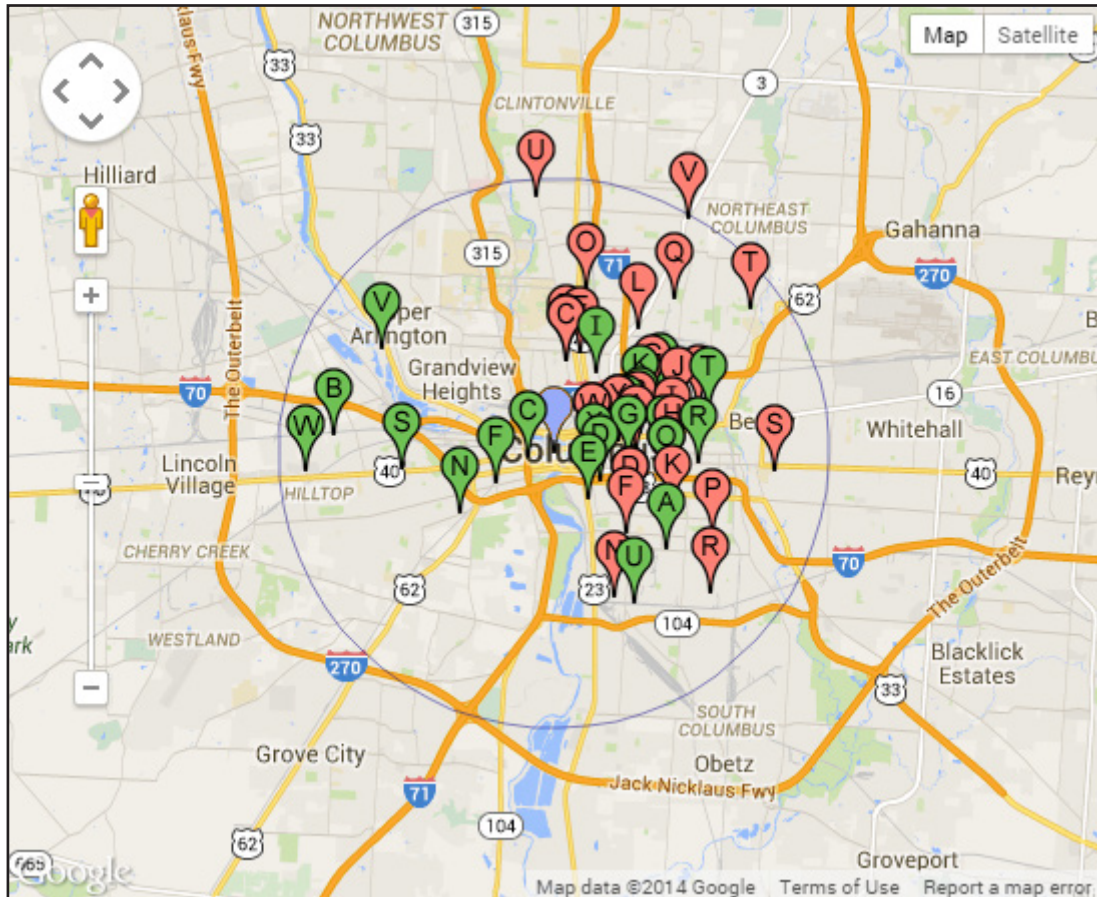
Site Administrators play a hugely important role within The Ohio Benefit Bank network. They promote their services, recruit volunteers, ensure volunteers complete training, maintain the site profile within the online service, pull reports, and the list goes on. During tax season, certain tasks within this role become even more important.

### In This Section

This section will focus on the major tasks that Site Administrators will need to complete during or prior to tax season. How can you update your site's information within the online service? What kind of reporting capabilities do you have access to? This section will answer these questions and more.

## Updating Site Information

It is always important for your site's information to be accurate and up-to-date within the online service. With even more demand for your OBB services during tax season this becomes even more critical. Many clients will be using either The Benefit Bank Site Locator or the Ohio Association of Foodbanks consumer assistance hotline (1-800-648-1176) to find a tax assistance location near their home. If your site information is listed incorrectly it will affect their ability to find this assistance or call you for more information.



### Steps to Updating Site Information

1. First, navigate to The Ohio Benefit Bank Counselor Support website (<http://support.ohiobenefits.org>)
2. Click 'counselor login'
3. Enter your Site Administrator login name and password
4. Click 'view organizations' from the homepage
5. Click the name of your organization
6. Click 'update information'

## Pulling Your Custom Self-Serve URL

As mentioned earlier in this guide, each site within The Ohio Benefit Bank network is automatically assigned a custom Self-Serve URL. Any activity that occurs using this custom URL is tracked and recorded within the online service so you can report your site's impact to partners, funders, and your community. The URL can be posted on your organization's website, social media, newsletters, and used at your tax clinics and other events.

### Steps to Pulling Your Custom Self-Serve URL

1. First, navigate to The Ohio Benefit Bank Counselor Support website (<http://support.ohiobenefits.org>)
2. Click "counselor login"
3. Enter your Site Administrator login name and password
4. Click "view organizations" from the homepage
5. Click the name of your organization

*Your custom Self-Serve URL should be the sixth item down on this page*

## Pulling an Activity Report

Site Administrators, and counselors in some instances, can pull reports from The Benefit Bank to highlight their efforts to provide application and tax assistance services. Reports within the report portal cover things like clients served, counties served, applications/returns completed, counselor valuation, Earned Income Tax Credit levels, and so much more. During tax season there is one report that is particularly helpful: the tax summary report.

### Steps to Pulling a Tax Summary Report

1. First, navigate to The Ohio Benefit Bank Counselor Support website
2. Click “counselor login”
3. Enter your Site Administrator login name and password
4. click the “Network” link/tab
5. Click “report portal”
6. Click “\*NEW\* generate/save a spreadsheet report”
7. Choose “tax summary by site for current tax year” as your report
8. Enter a report title if desired
9. Select your organization as the site (If you operate more than one location, choose the *host site*)
10. Enter the appropriate date range
11. Add client or counselor conditions if desired
12. Click “generate” and the report will be sent to your email address when ready

*If you do not receive the report within 30 minutes or so, double check that your email address is listed correctly in your profile*

# Example Report Generator

**THE BENEFIT BANK®**  
CONNECTING COMMUNITIES TO RESOURCES

HOME | REPORT PORTAL | EDIT PROFILE

## Generate a Report

Report:

Title (optional):

Site:

Include affiliated sites:

From:

Through:

### Service Model Activity

Counselor-assisted clients:

Self-serve clients:

VITA FSA clients:

Managed clients (TBB Pro):

### Client Conditions

### Site Conditions

