OBB Tax Counselor Instructions

For each client a counselor will need:

- OBB login card
- OBB client envelope

1. Welcome your client and tell them your name.
2. Review the client agreement with them:
    - All information is their responsibility, including its truthfulness and accuracy
    - You are a volunteer assisting them to use The Benefit Bank® and cannot answer any tax questions for them
    - You are not a tax professional and do not represent the IRS
    - All services available through The Benefit Bank are free and they should never be asked for payment for them
    - When the session is done, the client will walk away with their user name and password and no one will have access to it without their knowledge
3. Give a TBB card to list their login and password when you create their account.
4. Print out both federal and state returns for clients (two copies if mailing the return).
5. If folks inquire about making an amendment to previous year's taxes, they will need to be referred to the IRS website as The Benefit Bank does not support this.
6. Record refund or owed amount for each return on the Counselor Refund Log.
7. Explain the follow-up instructions:
    - You will receive a letter from TBB within a week or an e-mail within 3-5 days stating that your return was either accepted or rejected
    - If rejected the letter or e-mail will tell the client exactly where the error is on the return
    - Clients can use their login and password to make the correction on their own at ohiobenefits.org OR visit any OBB counselor
8. Be sure to give clients the name and phone number of a person they can follow up with if they have questions.

Thank you for doing this important work!