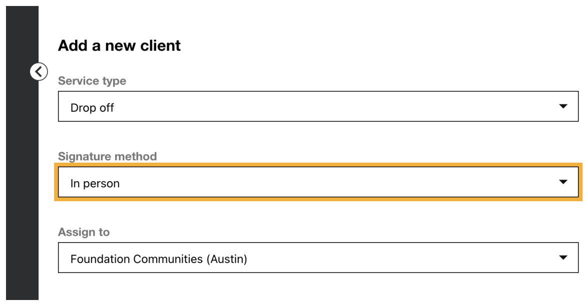
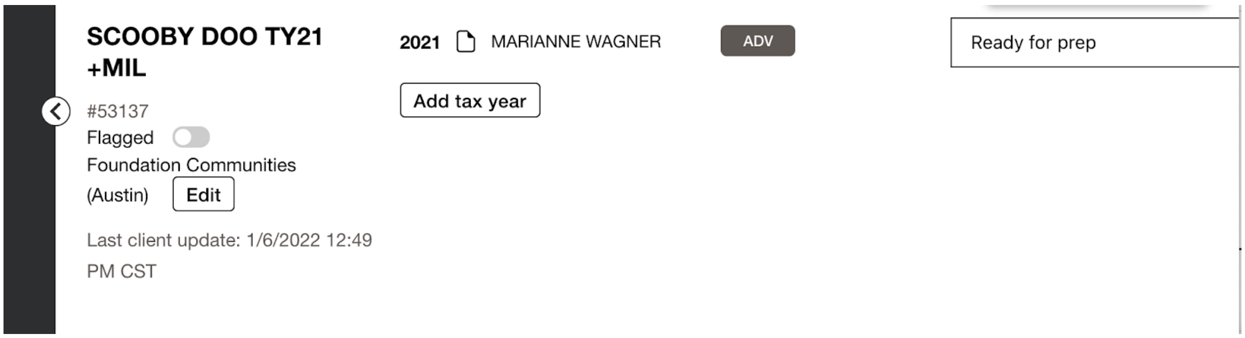
HOW TO CREATE A TICKET IN THE HUB

1) Log into the HUB. The system will time out if you have not been active.
2) Click the ADD CLIENT button. Do not use the CTC client option, that is a feature that we are not using at this time.
3) For SERVICE TYPE, select DROP OFF
4) For SIGNATURE METHOD, select IN PERSON
5) For ASSIGN TO, select FOUNDATION COMMUNITIES



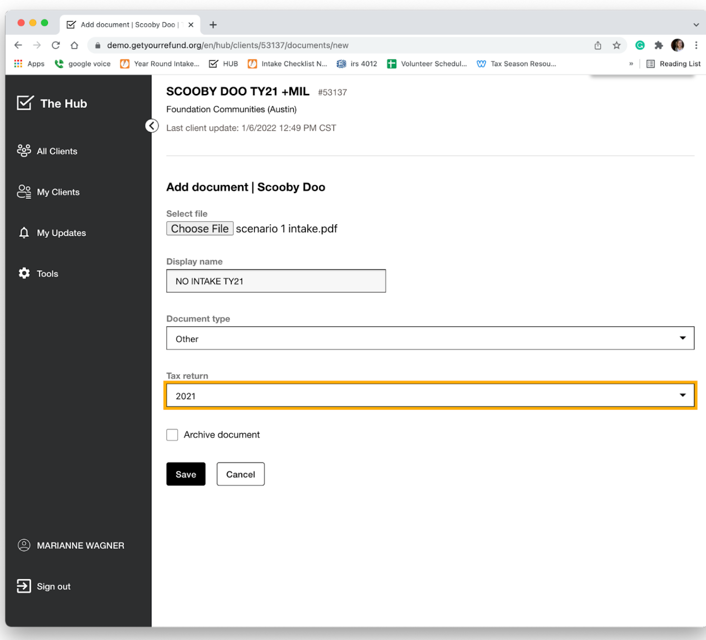
6) Enter client's first and last name
7) For preferred name field, use the Hub Ticket Naming and Modifiers document. The preferred name will be the primary taxpayers first and last name without any middle initials or the spouse's name, ex: JOHN SMITH TY21
8) You will need to enter either a cell number or email address and opt in to notifications
9) Enter the rest of the client information
10) Choose the appropriate certification level and the tax years that we will be preparing. Please NOTE, if there are returns prior to 2018, you will not be able to add that tax year. Prior years will only be indicated using the modifiers in the ticket's preferred name, ex: TY17, TY16
11) Click SEND FOR PREP and the ticket will be generated
12) Open the ticket by clicking on the client's name
13) Click the ASSIGN + button
    a) Drop Off Tickets assign to DO Manager
    b) STS tickets assign to DO Manager
    c) FSS tickets assign to Rania Ghallab

14) Confirm that the preferred name includes the tax year(s) and any modifiers, you have made the correct assignment, the certification level is correct, and the status is Ready for Prep



15) At this point you will add your scanned PDF with the client's tax documents under the document tab. Click ADD DOCUMENT and upload the PDF from your computer.

16) Indicate the document type from the drop down menu and name the document using the site abbreviation, intake, and tax year.



17) Make any notes for tax prep under the Notes tab. Please indicate which tax year the note pertains to if there is more than one year on the ticket. Notes are very helpful for Drop-Off since they do not have the client in front of them. Please include any information you think tax prep could