

## Frequently asked questions: The Benefit Bank® of North Carolina

### 1. Why is The Benefit Bank® of North Carolina no longer operational?

- Communally—the company that owns the technological platform—is filing for Chapter 7 bankruptcy following difficulties raising financial capital to support its continued existence.

### 2. How do I access my personal information?

- Log into your Self-Serve account at:  
[https://selfserve.thebenefitbank.org/ums?task=client\\_portal](https://selfserve.thebenefitbank.org/ums?task=client_portal)

### 3. What do I do if I forgot my user name?

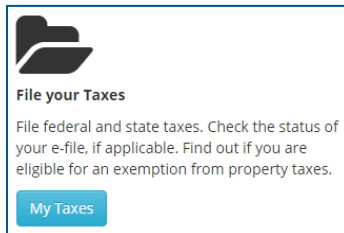
- If you forgot your user name, send an email to [tbbhelp@thebenefitbank.org](mailto:tbbhelp@thebenefitbank.org) requesting your user name. Please be aware that after **July 31, 2019**, we cannot guarantee you will be able to access your account information.

### 4. I've tried to reset my password and did not receive a link.

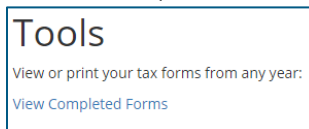
- It is possible the underlying technology that supports this action is no longer available. Unfortunately, we do not know if it will return.

### 5. How do I access tax documents from my prior years?

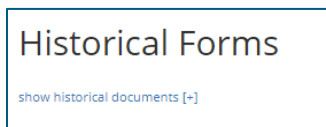
- First, log into your Self-Serve account at:  
[https://selfserve.thebenefitbank.org/ums?task=client\\_portal](https://selfserve.thebenefitbank.org/ums?task=client_portal)  
Click on “File your taxes”:



- Click on “View Completed Forms”:



- Click on “show historical documents [+]”:



- Click on the hyperlink for the form you would like to download or access:

Date	Category	Form Name
02/13/2017 5:18pm	2016 NC Tax Forms	North Carolina Income Tax form (D-400)
02/13/2017 5:17pm	2016 Federal Tax Forms	Worksheet for Student Loan Interest Deduction
02/13/2017 5:17pm	2016 Federal Tax Forms	IRA Deduction Worksheet
02/13/2017 5:17pm	2016 Federal Tax Forms	Fed Tax 2016 Form 1040
01/24/2016 5:10pm	2015 NC Tax Forms	North Carolina Income Tax form (D-400)
01/24/2016 5:08pm	2015 Federal Tax Forms	Worksheet for Student Loan Interest Deduction
01/24/2016 5:08pm	2015 Federal Tax Forms	IRA Deduction Worksheet
01/24/2016 5:08pm	2015 Federal Tax Forms	Fed Tax 2015 Form 1040
01/25/2015 11:33am	2014 NC Tax Forms	North Carolina Income Tax form (D-400)
01/25/2015 11:30am	2014 Federal Tax Forms	Worksheet for Student Loan Interest Deduction
01/25/2015 11:30am	2014 Federal Tax Forms	Fed Tax 2014 Form 1040

**6. Will my information be kept safe and secure when Communally closes and The Benefit Bank is no longer operating?**

- We believe that the confidentiality protections that governed your personal information will be preserved by any entity that secures the underlying technology assets of Communally. Unfortunately, we currently do not know what, if any, options there will be to retrieve your personal information (e.g. AGI from prior tax returns) after the website is shut-down.

**7. Where can I go to apply for public benefits, work supports, and student financial aid?**

- Tax assistance:
  - [E-File Options for Individuals](#)
  - [Volunteer Income Tax Assistance \(VITA\) locator](#)
  - [AARP Tax Assistance Locator](#)
- Student financial aid:
  - [FAFSA.gov](#)
  - [CFNC.org](#)
- Public benefits:
  - [North Carolina ePASS](#)