



## ONLINE GIVING

### Tax Reports

As we approach the end of the year, the tax report feature can be very helpful and is also easy to use. If you are only using your online giving platform and you would like to send the tax report directly to the donors through the OSV Hub, you can select the link below for detailed instructions. This will give you the option to either print as a PDF using windowed envelopes or labels, or to email the statements. We have created a new feature within this report to set a minimum donation amount. You can set any minimum amount that will only generate statements for donors whose total contributions are at or above the set minimum, or you can leave the minimum at \$0.00 to generate all the statements. Click below for more information.

### [Full Tax Report](#)

In addition to running a full tax report for all donors, you are able to generate a single report for any individual family. Click below for steps on running a tax report from within a donor account.

## [Individual Tax Statement](#)

Using OSV Church Manager? You can email your statements to those with email addresses and mail out the remaining statements. Your statements will include both the physical and online giving transactions because your donors are linked to their directory record. Click below for more information.

## [Run a Tax Statement from Directory](#)

### **Success Guide**

Take advantage of our [OSV Online Giving Success Guide](#) to elevate your online giving strategy. With well over a decade of experience with online giving, OSV is at-the-ready to help you increase your offertory and planned contributions with easy-to-implement tactics that can make a big impact. If you would like to speak with a coach about any of these tactics, you can submit your request for online giving success coaching [here](#).

### **Remove Donor Membership**

If you are wanting to start off the new year with a cleaned-up donor list, you can accomplish this by removing the membership of anyone who is no longer actively giving. You can use the [Donor List report](#) to find anyone who is no longer active by applying the Inactive Contributor Status filter. This will generate a list of donors who have not given in 90 days or more (Note: if you are also using our Directory product, you can [customize this timeframe](#)). You can use the information from this list to then remove the accounts from your donor list, if desired, by going to Accounts, searching for the donor, opening the desired donor account, clicking the kebab

(three vertical dots) to open the options menu, and selecting [Remove Donor Membership](#). To confirm your desire to remove the donor's membership, the system will have you type in the donor's email address. Once the account is removed, the donor will still be included on tax reports but will not appear in an account list or on an account report. Removing a donor's membership does not delete the donor's account or remove their own access to their account — it simply disassociates the donor's account from your organization.

## DIRECTORY

### Matching Accounts

As the end of the calendar year approaches, it is essential to make sure your online giving donor accounts are matched up correctly to their Directory records. By matching the donor and Directory records, the donor will receive one tax statement at the end of the year that contains all physical and online donations. For more information on how to verify this is done, review the Knowledge Base article [here](#). Be sure you know how your church enters contributions. If they are at the family level, then you will match to the household. If they are entered at the member level, then you will want to match to the individuals themselves. Thank you for taking the time to make this important connection!

### Address Verification

When you log into the OSV Hub and click on Directory, there are many helpful tools called out at the top if they are needing attention. One of the tools is [Address Verification](#), which follows changes submitted to the U.S. Postal Service. Following the NCOA (National Change of Address), OSV will notify you if members have submitted an address change. By accepting these changes, you can ensure your member's

mailing address is accurate within your system. This is especially important as the end of the year approaches and more parish-wide mailings are being sent out. If you are unsure of any changes, it is always best to reach out to your parishioner and review questions with them.

### **Archived Tip of the Month**

Did you miss one of our Tip of the Month emails? Check out our new archive to view previous tips and links!

[Tip of the Month Archive](#)

### **Help in the Hub**

- Did you know that we have a Knowledge Base built into the OSV Hub? You can access articles, step-by-step instructions, videos, and FAQs.