

REQUIRED ATTACHMENTS GRID

Required ONLY if site uses the One Visit Scan Model Tax Prep Information Email

Attachment No.	Red text indicates the documents are required attachments, all others are discretionary.	Which attachments are discretionary at the site level?
1	Summary of Attachments	REQUIRED. This is an editable GoogleDoc, eliminate any attachments your site does not use
1.1	COVID - 19 Screening	REQUIRED
2	How Your Return Will Be Prepared	REQUIRED
3	Explanation of Form 14446	REQUIRED
4	Form 14446 (for signature)	REQUIRED
5	Documents We Need	REQUIRED
6	AARP Foundation Tax-Aide Intake Booklet (fillable)	REQUIRED
7	Creating Your TaxSlayer Customer Portal Account	REQUIRED
8	Messaging Your Preparer Through Your TaxSlayer Customer Portal Account	
9	How to Join a Google Meet Video Conference	
10	How to Share Your Screen During a Google Meet Video Conference	
11	Viewing and Downloading Your Return Via the Customer Portal	
12	Electronically Signing Documents Via the Customer Portal	
13	Economic Impact Payments Worksheets	REQUIRED
14	Supplemental Information Sheet	Only if your site uses a Supplemental questionnaire / intake sheet
15	Schedule C Worksheet (produced by NTTC) *	Only if your site prepares returns with self-employment
16	Schedule A Worksheet (produced by NTTC)	Only if your site prepares returns for Schedule A taxpayers
17	Education Credits Worksheet (NTTC)	Only if your site prepares returns claiming education credits
18	Self-Employed COVID Worksheet	Only if your site prepares returns with self-employment