

**REQUIRED ATTACHMENTS GRID**

**ONLY if site uses the 2 Visit Scan Model Tax Prep Information Email**

	<b>Red text indicates documents are required attachments, all others are discretionary.</b>	<b>Which attachments are discretionary at the site level?</b>
<b>1</b>	<b>Summary of Attachments</b>	<b>REQUIRED.</b> This is an editable GoogleDoc, eliminate any attachments your site does not use
<b>1.1</b>	<b>Covid-19 Screening</b>	<b>REQUIRED</b>
<b>2</b>	<b>How Your Return Will Be Prepared</b>	<b>REQUIRED</b>
<b>3</b>	<b>Explanation of Form 14446</b>	<b>REQUIRED</b>
<b>4</b>	<b>IRS Form 14446 (for signature)</b>	<b>REQUIRED</b>
<b>5</b>	<b>Documents We Need</b>	<b>REQUIRED</b>
<b>6</b>	<b>AARP Foundation Tax-Aide Intake Booklet (fillable)</b>	<b>REQUIRED</b>
<b>7</b>	<b>Economic Impact Payments Worksheets</b>	<b>REQUIRED</b>
<b>8</b>	Supplemental Information Sheet	Only if your site uses a Supplemental questionnaire / intake sheet
<b>9</b>	Schedule C Worksheet (produced by NTTC)	Only if your site prepares returns with self-employment
<b>10</b>	Schedule A Worksheet (produced by NTTC)	Only if your site prepares returns for Schedule A taxpayers
<b>11</b>	Education Credits Worksheet (NTTC)	Only if your site prepares returns claiming education credits
<b>12</b>	Self-Employed COVID Worksheet	Only if your site prepares returns with self-employment