

**AARP Foundation Tax-Aide
06 – Document Scan Sequence**

Remember: TaxSlayer has a **file size limit of 5 megabytes (MB)** for any given scan file. Multiple scan files may be uploaded to a tax return but the **total size for all scan files uploaded to any given return is 25MB**.

To the extent possible, please arrange the digital copies of your documents in the order listed below. This is best accomplished by scanning / photographing the documents in the order listed. If something is out of order, you do not have to re-do the file. You may not have all of these documents. Please send us digital copies of all of the documents that apply to your tax situation.

1. Form 14446, all 3 pages, with taxpayer(s) signature(s)
2. Photo ID / driver license for taxpayer and spouse – front and back
3. Taxpayer and spouse SS cards
4. Dependent(s) SSA or ITIN card(s)
5. Intake Booklet – all pages
6. Site's Supplemental Information Sheet, if applicable
7. Schedule A Worksheet
8. Schedule C Worksheet
9. Education Credits Worksheet
10. W-2s
11. State / Local Refund Form 1099-G Box 2
12. Interest and Dividend Forms
13. 1099-Rs
14. RRB-1099-Rs
15. SSA-1099-R
16. Unemployment Compensation Form 1099-G Box 1
17. 1099-Misc
18. Form 1099-Ks
19. Schedule Es
20. Capital gains info – brokerage statements, etc.
21. Information regarding alimony received
22. Other income items: i.e., jury duty pay, gambling winnings, 1099-C, etc. 21.
Information regarding educator expenses, HSA's, alimony paid, IRA deduction,
student loan interest, etc.
23. Info for Child Care Credit (Statement from Caregiver with name, address, EIN, amount
paid for each child)
24. Student Account Statement
25. Forms 1098-T
26. Information on all Federal and State estimated tax payments
27. Health Insurance information (Form 1095 A, B, or C)
28. Prior year tax return