

REQUIRED ATTACHMENTS GRID - TAX PREP INFO EMAIL

THIS IS REQUIRED FOR THE NO SITE VISIT SCAN MODEL

Attachment No.	Red text indicates documents are required attachments, all others are discretionary.	Which attachments are discretionary at the site level?
1	Summary of Attachments	This is an editable GoogleDoc, eliminate any attachments your site does not use. REQUIRED
2	How Your Return Will Be Prepared	REQUIRED
3	Explanation of Form 14446	REQUIRED
4	IRS Form 14446 (for signature)	REQUIRED
5	Documents We Need	REQUIRED
6	Document Scan Sequence	REQUIRED
7	AARP Foundation Tax-Aide Intake Booklet (fillable)	REQUIRED
8	Scanning Your Documents	REQUIRED
9-15	Creating Your TaxSlayer Customer Portal Account Uploading your Scanned Documents to Your TaxSlayer Customer Portal Account Messaging Your Preparer Through Your TaxSlayer Customer Portal Account How to Join a Google Meet Video Conference Share your Screen During a Google Meet Video Conference Accessing/downloading Your Return Through Your TaxSlayer Customer Portal Account Electronically Signing Documents Through Your TaxSlayer Customer Portal Account	<p align="center">REQUIRED</p> <p align="center">These documents, are combined in the "Taxpayer Instructions - Taxslayer Customer Portal and Google Meet Video Conferencing" document.</p>
16	Economic Impact Payments Worksheets	REQUIRED
17	Supplemental Information Sheet	Only if your site uses a Supplemental questionnaire / intake sheet
18	Schedule C Worksheet (produced by NTTC)	Only if your site prepares returns with self-employment
19	Schedule A Worksheet (produced by NTTC)	Only if your site prepares returns for Schedule A taxpayers

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20	Education Credits Worksheet (NTTC)	Only if your site prepares returns claiming education credits
21	Self-Employed COVID Worksheet	Only if your site prepares returns with self-employment