Requesting Stimulus Payment Trace for Clients

1. Create a folder in Sharefile in "_ Requested Transcripts" with the clients name
2. Upload the clients Social Security Card and Photo ID (If MFJ upload taxpayer AND spouse ID and SSC) to the folder from step 1
3. Complete the LITC Client Application Form - **NOTIFY CHELSEA when complete**
    a. Bookmark this form!
    b. Make sure under "Briefly describe your tax issue" you say that the client wants to trace their stimulus payment and specify which one
4. Print the Form 8821 that Chelsea uploads to their folder (two forms if MFJ)
5. Have the client sign the 8821
6. Make a copy of the 8821
    a. The client gets the copy
    b. The **ORIGINAL** goes in a folder at your site specifically for these forms
7. Scan and upload the 8821 into the folder you created in step 1
8. Upload any letters, relevant tax documents and signed tax returns to the folder you created in Sharefile. Inform Chelsea and wait for further instructions as additional forms may need to be signed. Make sure originals are kept of any form or letter sent for signature.

NOTE: This client's status in Quickbase should be service type = IRS/MI Letter and status = referred to LITC