

Requesting Transcripts for Clients

If a client comes into the tax site and transcripts need to be pulled for tax preparation or amendment purposes, follow these steps:

Step 1: Sign into [Sharefile](#) and open the Shared   VITA-LITC folder.

Step 2: Create a folder in "_ Requested Transcripts" with the clients name.

Step 3: Scan and upload the clients **Social Security Card** and **Photo ID** (If MFJ upload taxpayer AND spouse ID and SSC) to the folder you created. Also upload any **IRS notices** or **completed tax returns** for the year(s) transcripts are requested. Rename the files as what they are, including tax years if applicable. Please make sure each letter and/or return are scanned as individual documents.

Step 4: Complete the fillable [Form 8821](#). It must be downloaded in order to edit it.

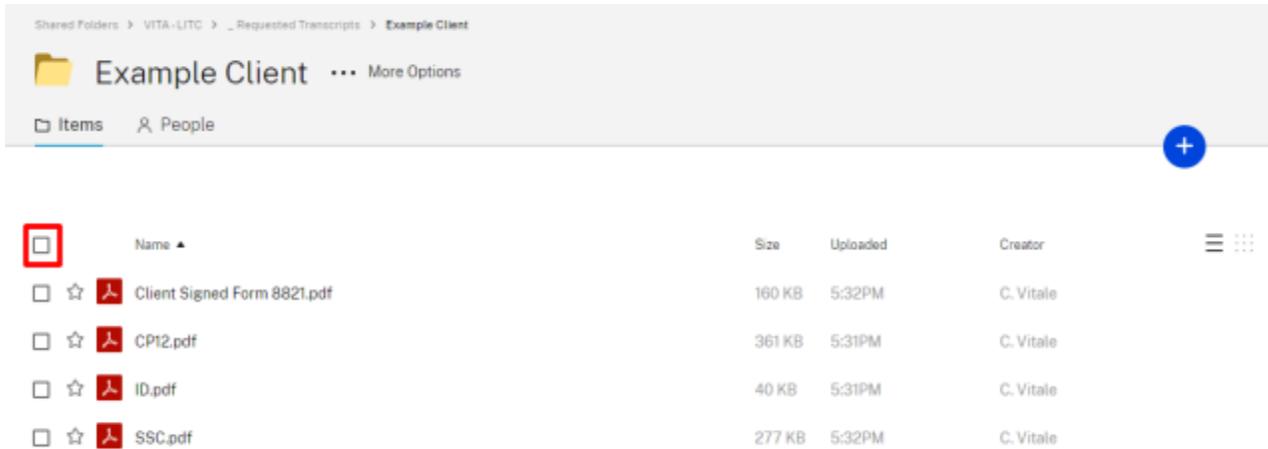
- If **both** taxpayer and spouse need transcripts pulled, **both** need Form 8821 completed.
- Delete any default wording (name, address, year(s) or period(s)).
- The name **and** address **MUST** be entered as what the IRS **currently** has on file for the client.
- Enter their social security number and phone number.
- Print the form and have the client sign (in cursive) and date part 6 in **BLACK** pen. Please don't put an "x" or any other marking where they need to sign and date, just point it out to the client as this could cause issues when trying to send the form to the IRS.
- Scan and upload the form to their folder you created in Sharefile.
- Make the client a copy and keep the original signed form in a secure place at your site.

Step 5: Complete the [7216 letter](#). It must also be downloaded in order to edit it.

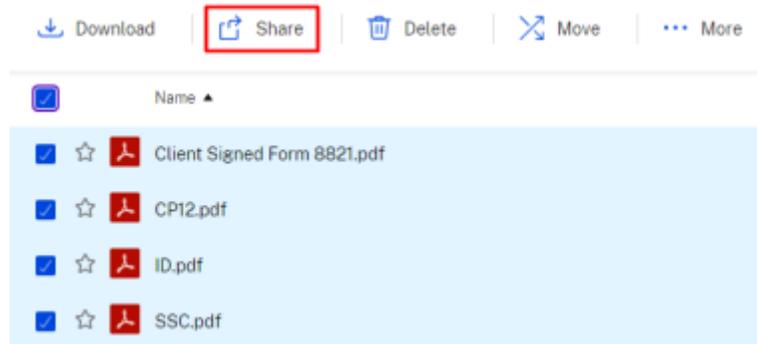
- Type the clients' name as entered on the 8821.
- Print the letter and have the client sign (in cursive) and date above their name.
- Scan and upload the form to their folder you created in Sharefile.
- Make the client a copy and keep the original signed letter in a secure place at your site.

Step 6: Send all uploaded documents through Sharefile to the LITC department (litc@accountingaidsociety.org). Doing this will signal to the department that you have a need for transcripts. To do this, follow these steps:

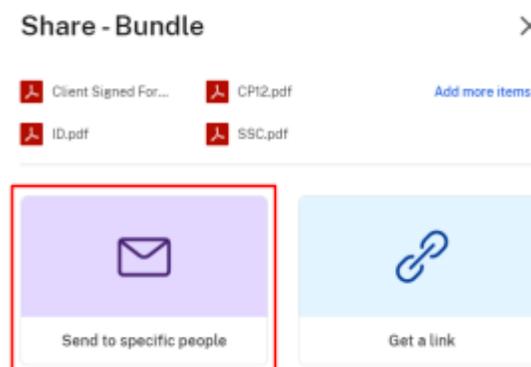
1. Click on the box above all the documents to select them all.



2. Click on “Share” in the menu that appears above the documents.



3. Click on the purple “Send to specific people” box.



4. In the “To” box, type in “LITC” and the contact name should pop up. If it does not, type in their email address, **litc@accountingaidsociety.org**.
5. Enter the following information in the “Message” box: **Sending over required documents for (client’s name) for a transcript pull for (requested year(s))**. Click “Send”.

Step 7: Complete the [Transcript Request Form](#)

- Bookmark this form!
- Make sure the form states exactly why the transcripts need to be pulled

Step 8: Change the stage and status of the tax return or amendment to **“In Production”** - **“Transcripts Requested”**

▼ **Services**

Year *	Service Type *
2022 × ▼	Amended Tax Return × ▼
Stage *	Status *
In Production × ▼	Transcripts Requested × ▼

Note: If a client comes in with an IRS letter stating they owe money or another action needs to be taken for their return to process, do not complete the Transcript Request Form and follow [these instructions](#) instead.