Requesting Transcripts 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 Transcript Request Form (Chelsea will be notified when you submit the form)
   a. Bookmark this form! It can also be found on our Resource Page
   b. Make sure the form states exactly why the transcripts need to be pulled
4. Print the Form 8821 that Chelsea uploads to their folder
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. Wait until you receive the transcripts from LITC and then schedule your client an appointment to return for tax preparation

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 complete the LITC Client Application Form instead. 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.