DO NOT send a client home to retrieve missing documentation before quickly screening their paperwork for scope.

- Review IRS Form 13614-C and make sure it is completed. A 13614-C is required for each tax year being completed.
  - **Part I: Personal Information**
    - Verify original photo IDs for Taxpayer and Spouse and SS Cards/ITINs for everyone on the return.
    - Please reference the Mini Manual for all expired ITINs.
  - **Part II: Filing Status and Household Information**
    - Determine filling status and complete the grey sections for dependents.
  - **Part III: Income Documents**
    - Review all income questions with their corresponding documents, all answers should be Yes or No (No Unsure answers.)
    - If there is more than one of a certain income document (ex, Four W2s, two 1099-Rs), please indicate the number of documents on the 13614-C in the comment section.
  - **Part IV: Expenses**
    - Review all expense questions with their documents, all answers should be Yes or No (no Unsure answers.)
    - Make sure to fill out the “Self-Employment Tax Document Checklist” form, if needed.
  - **Part V: Life Events**
    - Review all life event questions, all answers should be Yes or No (No Unsure answers.)
  - **13614-C, Page 3: Additional Information and Questions Related to the Preparation of Your Return**
  - **13614-C, Page 3: Additional Comments Section**
    - Add any additional notes for the Tax Preparer and Quality Reviewer. If you looked up a property PIN or prior year AGI, please add that information here.
  - **13614-C, Page 4: Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites**
    - Please make sure Taxpayer and Spouse, if applicable, sign this consent form for TaxSlayer.
  1. Make sure that the client (and spouse if applicable) has signed the Ladder Up TAP Client Agreement (pg. 3) of the Supplemental Intake Packet.
  2. Make sure that the client has filled out the Supplemental Intake Sheet pages 1 and 2.

**Ladder Up will only keep the Ladder Up TAP Client Agreement and the signed E-file consent pages, these will be collected by the Quality Reviewers. We do not keep ANY OTHER original documentation! Everything else must be returned to the client.**
Retrieving Tax Client IL-PIN

   a. Website: https://mytax.illinois.gov/

2. Scroll down to Inquires for Individuals, then click IL-PIN Inquiry

3. Enter requested information, you can choose Driver’s License, State ID, or Prior Year AGI.

4. When information is complete, check the I confirm box, then click Conduct Inquiry.

5. Copy the IL-PIN to clients 13614-C or enter into software.