

DROP-OFF INTAKE – DOCUMENT ORDER FOR SCANNING

1. COPIES OF ID AND SOCIAL/ITIN LETTER
2. 13614C – INTAKE SHEET
3. INCOME DOCUMENTS – IN THE ORDER OF THE INTAKE SHEET
4. DEDUCTION DOCUMENTS (ex: MORTGAGE INTEREST) IF APPLICABLE
5. CREDIT DOCUMENTS (ex: EDUCATION OR ENERGY) IF APPLICABLE
6. MARKETPLACE INSURANCE 1095-A IF APPLICABLE
7. SIGNED VIRTUAL CONSENT

!!UPLOAD THE INTAKE CHECKLIST AS A SEPARATE DOCUMENT INTO THE HUB!!

*After scanning, please review the document in Scansnap to confirm that the documents are all present, clear, and oriented properly.