

QUICK GUIDE TO DROP-OFF INTAKE

(both spouses if MFJ, or refer to virtual at getyourrefund.org/fc)

1. Photocopies of ID/SSN

2. Form 13614-C INTAKE/INTERVIEW

3. Virtual DO Consent (SIGNED)

4. Drop-off Intake Checklist (save to PDF)

5. Additional Options:

- **Self Employment Worksheet**
- **Education Credit Checklist**

6. Scan Documents

7. Transfer to Hub:

- a. Create Hub Ticket.**
- b. Upload scanned documents.**
- c. Move ticket to Tax Prep: Ready for Prep.**
- d. Assign ticket to “DO MANAGER”**