



DRIVER'S LICENSE or ID REQUIREMENT

Illinois is Now Requiring to efile!

A handful of states are now requiring a valid taxpayers driver's license(s) or ID number to e-file a tax return. This is an additional security measure to confirm a taxpayer's identity and eventually other states will follow.

Current States with Driver's License or ID Requirement

Alabama Illinois Ohio New York New Mexico

Options to Provide SS+G with Driver's License or ID Information

A Photo Copy is preferred so we can properly confirm the information.

1. Secure Link – NO DROPBOX ACCOUNT IS REQUIRED
 - o The easiest way to provide SSG a photo copy electronically is to use the upload link below.
 - i. [LINK TO EASILY UPLOAD DRIVERS LICENSE PHOTO](#)
 - ii. Click "Add Files"
 - If photo previously was taken, Click Add photo and select from your "photos"
 - If photo has NOT yet been taken, Click "Take Photo or Video" & Take a cell phone photo of driver's license or ID
 - Browse will allow you to upload from any other source (Dropbox, iCloud, G-drive)
 - iii. Type in your Name & Email Address in the 2 textboxes provided.
 - iv. Click "Upload" and SSG will receive photo secure & encrypted insuring security.
 - v. Client will receive a confirmation email that the files were successfully uploaded.
2. Client Organizer
 - o Write/type in your information in the mailed paper copy or electronic Client Organizer.
 - o Located on "Personal Information" Page in the Tax Organizer.
 - o Please remember to fill in this information before returning back to SSG.
3. Shared Dropbox folder – Place copy in our shared Dropbox Folder
 - o If you have a Dropbox account place a copy along with all other files in our shareable folder.
 - o Place in 2020 - NOT YET FILED > FILES
4. Personal Dropbox Upload Link – NO DROPBOX ACCOUNT IS REQUIRED
 - o Every client has a secure encrypted personal upload link to our shared Dropbox.
 - o This link can be located in email sent to client when 2019 tax return electronic copies were completed. Or Email jmg@ssgltd.com to be directly forwarded your personal upload link.
 - o Files uploaded via your personal upload link are placed in folder with below filepath...
 Client First and Last Name (Shareable) > Upload Folder - Client First and Last Name
5. This Document - Write/type in your information below.

Taxpayer Name

Spouse Name

Driver's License or State-Issued ID Number

Driver's License or State-Issued ID Number

Expiration Date (Mo/Da/Yr)

Date (Mo/Da/Yr)

Issue Date (Mo/Da/Yr)

Issue Date (Mo/Da/Yr)

State Issued

State Issued