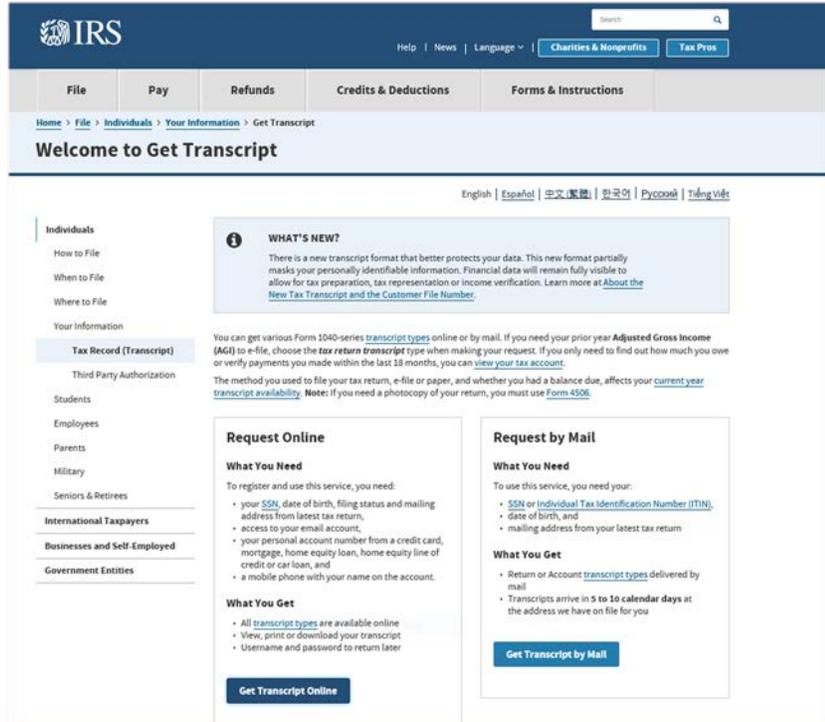


# Directions for Requesting an IRS Tax Transcript

1. We suggest that you print these instructions prior to clicking the link below.

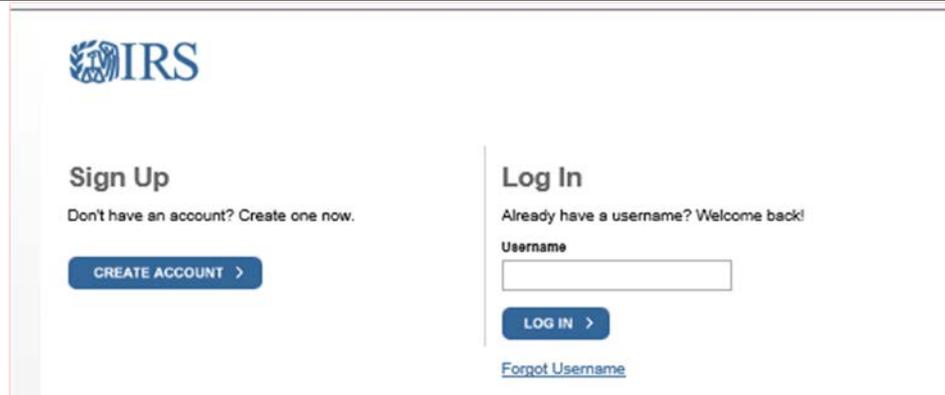
Link to request IRS Tax Transcript:  
<https://www.irs.gov/individuals/get-transcript>

Click on “Get Transcript Online”

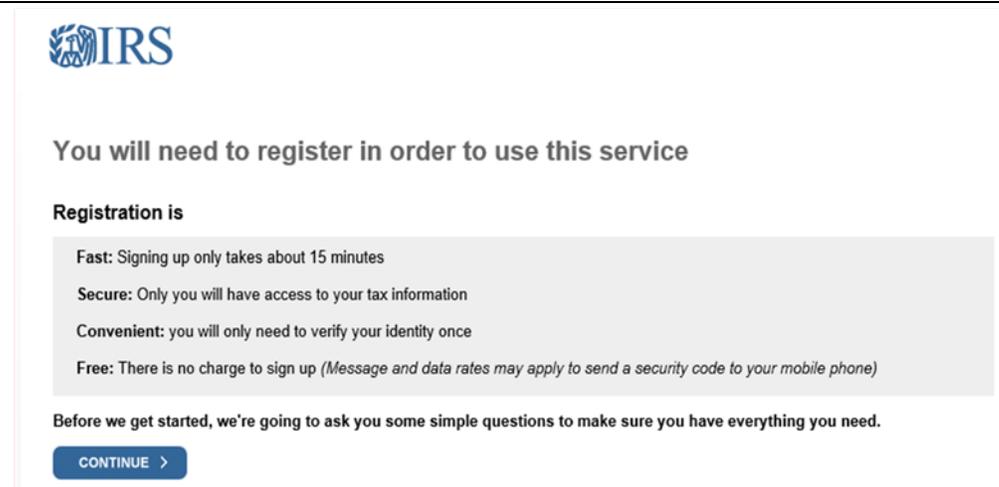


2. If you have an account, log in.

If you do not have an account, click “Create Account”.



3. Information Page, Click “Continue” after reviewing.

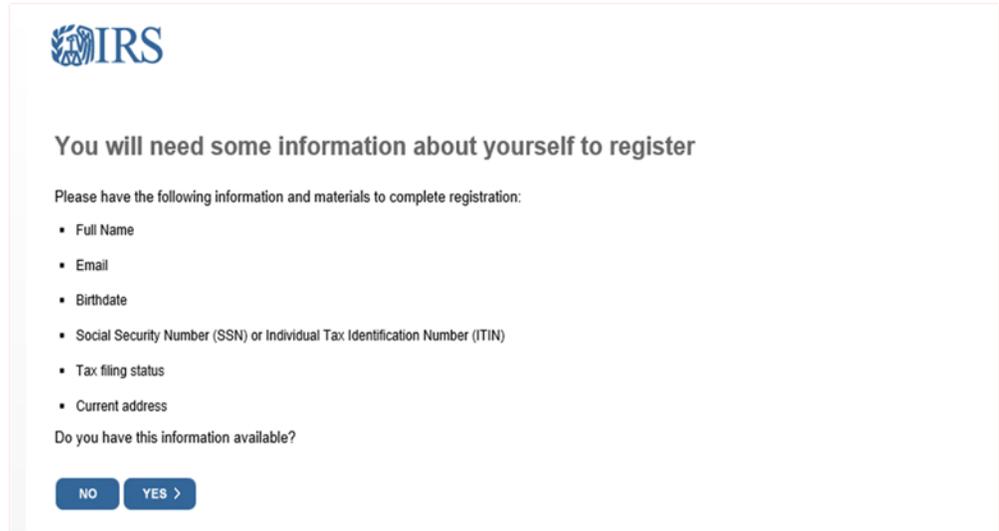


# Directions for Requesting an IRS Tax Transcript

4. Make sure you have the requested information available prior to starting your tax transcript request.

If you do not have the requested information, stop and obtain the requested information prior to proceeding.

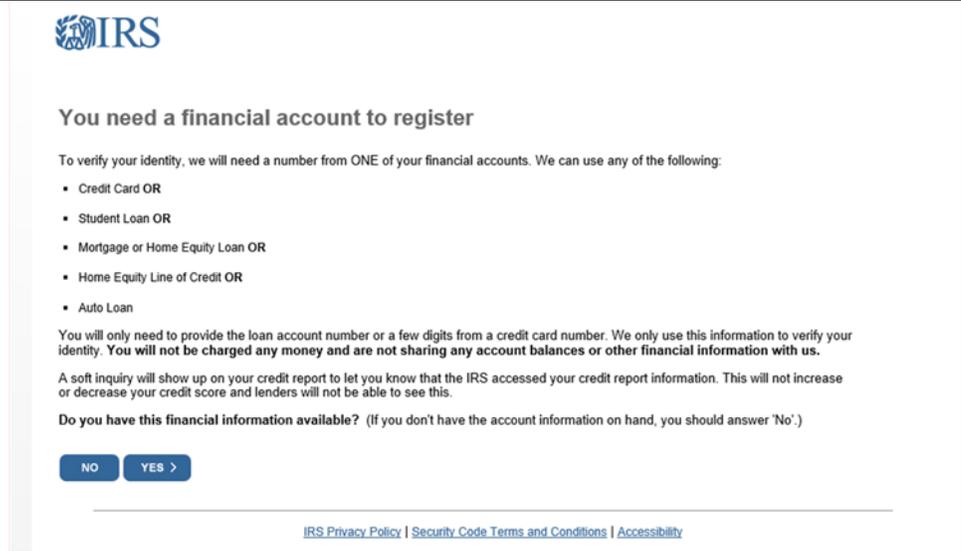
When you have obtained the requested information and are ready to proceed, click "Yes".



The screenshot shows the IRS logo at the top left. Below it is the heading "You will need some information about yourself to register". Underneath, it says "Please have the following information and materials to complete registration:" followed by a bulleted list: Full Name, Email, Birthdate, Social Security Number (SSN) or Individual Tax Identification Number (ITIN), Tax filing status, and Current address. Below the list is the question "Do you have this information available?" with two buttons: "NO" and "YES >".

5. Be sure that you have at least one of the listed financial documents to verify your identity.

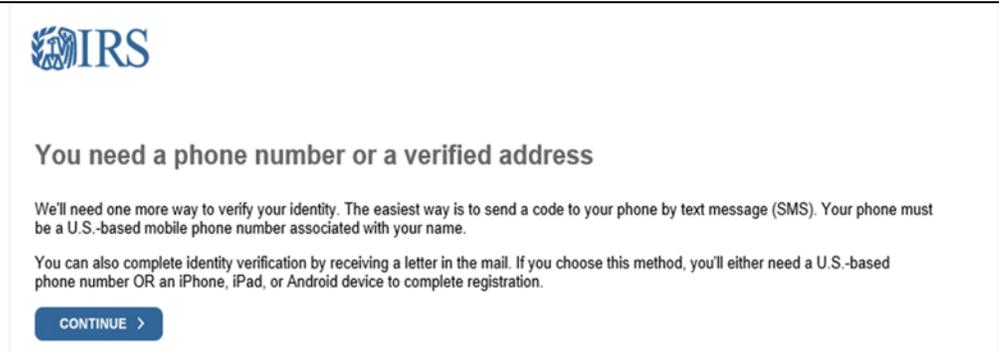
Once you have at least one of the requested financial documents, click "Yes" to proceed.



The screenshot shows the IRS logo at the top left. Below it is the heading "You need a financial account to register". Underneath, it says "To verify your identity, we will need a number from ONE of your financial accounts. We can use any of the following:" followed by a bulleted list: Credit Card OR, Student Loan OR, Mortgage or Home Equity Loan OR, Home Equity Line of Credit OR, and Auto Loan. Below the list, it says "You will only need to provide the loan account number or a few digits from a credit card number. We only use this information to verify your identity. You will not be charged any money and are not sharing any account balances or other financial information with us." Below that, it says "A soft inquiry will show up on your credit report to let you know that the IRS accessed your credit report information. This will not increase or decrease your credit score and lenders will not be able to see this." Below that, it says "Do you have this financial information available? (If you don't have the account information on hand, you should answer 'No'.)" with two buttons: "NO" and "YES >". At the bottom, there are links for "IRS Privacy Policy", "Security Code Terms and Conditions", and "Accessibility".

6. One more way is needed to verify your identity. The easiest way to have a code texted to your cell phone.

When you are ready click "Continue".



The screenshot shows the IRS logo at the top left. Below it is the heading "You need a phone number or a verified address". Underneath, it says "We'll need one more way to verify your identity. The easiest way is to send a code to your phone by text message (SMS). Your phone must be a U.S.-based mobile phone number associated with your name." Below that, it says "You can also complete identity verification by receiving a letter in the mail. If you choose this method, you'll either need a U.S.-based phone number OR an iPhone, iPad, or Android device to complete registration." Below that, there is a button: "CONTINUE >".

# Directions for Requesting an IRS Tax Transcript

7. Your name must match the name on our tax return.

Enter an email address that you have access to and click "Send Code".



## Let's Get Started!

It sounds like you have all the necessary information available and can begin.

First Name (as it appears on your most recent tax return)

Last Name (as it appears on your most recent tax return)

Email Address

Confirm Email Address

A confirmation code will be sent to your email address. You will need to get the code and enter it on the next screen.

CANCEL

SEND CODE >

8. A verification code will be sent to your email. You will need to get and enter the verification code before you can proceed.

Click "Continue" after you enter the verification code to continue.



## Check Your Email

We just sent a confirmation code to "[your email address](#)". This code is valid for 15 minutes. Open your email in a new window to get your confirmation code.

**IMPORTANT:** Keep this window open to avoid having to start over.

Enter the one-time code we emailed you:

Didn't receive the confirmation code? [Resend the email.](#)

CANCEL

CONTINUE >

9. The information provide on this page must match the information provided on your tax return.

Your address must match the address provided on your tax return.



Help us verify your identity with some basic information

If we are not able to match the information you enter with our records, you will not be able to use this online service but [other options are available to you.](#)

### Personal Information

All information should match your latest tax return.

First Name

 [Edit](#)

Last Name

 [Edit](#)

Date of Birth

Month  Day  Year

Social Security Number (SSN) or Individual Tax ID Number (ITIN)

 -  - 

### Filing Status

I have filed a tax return in the past seven years

Select filing status from your most recently filed tax return

I have not filed a tax return in the past seven years

### Address Information

Your address must match your most recently filed tax return. [Address Help](#)

Address Line 1

Address Line 2 (Optional)

City

State / Territory

Zip Code

Country

CANCEL

CONTINUE >

# Directions for Requesting an IRS Tax Transcript

10. The information you enter must be for an account that is included on your credit report.

You will need to complete this process before you can proceed with your tax transcript request.

The screenshot shows the IRS logo at the top left. Below it is the heading "Verify your financial account number". A sub-heading reads: "To prevent identity theft and protect the security of your tax information, you will need to verify your identity. Provide one of the following active account numbers:". There are five radio button options, each with a text input field: "Last 8 digits of credit card" (with a note: "(We are unable to verify debit cards, corporate cards, or American Express cards)"), "Student loan account number", "Auto loan account number", "Mortgage or home equity loan account number", and "Home equity line of credit account number". A sixth option is "I don't have a current credit card, student loan, auto loan, home equity loan, or mortgage". Below the options is a paragraph: "By providing financial account information, I authorize the IRS to access my credit report for the purpose of verifying my identity." At the bottom is a blue button labeled "CONTINUE >".

**Financial account information**

We will only use this information to verify your identity. You will not be charged any money and are not sharing any account balances with us.

A soft inquiry will show up on your credit report to let you know that the IRS accessed your credit report information. This will not increase or decrease your credit score and lenders will not be able to see this.

If you have a credit freeze, you authorize us to bypass that freeze to verify your identity.

If you do not wish to or cannot provide the information, you will not be able to register but other [options are available to you](#).

11. This is another step to verify your identity.

Enter your cell phone number and click "Send Message" to proceed.

The screenshot shows the IRS logo at the top left. Below it is the heading "Verify your phone number". A paragraph reads: "We need to verify that your personal information matches the subscriber information for your US-based mobile phone account. By continuing, you authorize your wireless carrier to disclose information to the IRS and its third-party service providers about your account, such as subscriber status, device details and plan type, if available, to support identity verification and fraud prevention. See our Privacy Policy for how we treat your data." Below this is another paragraph: "We may not be able to verify all mobile phone numbers. We can't verify landlines, some prepaid phones, or virtual phone numbers like Google Voice." There is a text input field labeled "Enter your mobile phone number:". Below the field are two buttons: "CANCEL" and "SEND MESSAGE >". A paragraph follows: "By continuing, you opt-in to receive a one-time code via text message or phone call each time you log in. Message and data rates may apply. [We won't use your phone number for any other communication.](#)" Below that is a section titled "Don't have a mobile phone or can't verify your phone number? Try these alternative options." with two links: "Receive an activation code by postal mail (~10 business days)" and "Review alternatives to using this online service." At the bottom is a footer with links: "IRS Privacy Policy | Security Code Terms and Conditions | Accessibility".

12. Enter the 6-digit code and click "Continue" to activate your account.

The screenshot shows the IRS logo at the top left. Below it is the heading "We sent an activation code text message to your phone". A paragraph reads: "The message contains a 6-digit activation code. Please enter the code below." There is a text input field labeled "6-digit activation code" and a link "Try again" to its right. At the bottom are two buttons: "CANCEL" and "CONTINUE >".

# Directions for Requesting an IRS Tax Transcript

13. Follow the instructions on the page to create your user profile.

After you have provided all of the requested information, click "Continue" to proceed.

**IRS**

### Create Your User Profile

We've been able to confirm your identity. Now you will create a user profile. This is the last step in the process.

#### Create a Username and Password

Username

Password

Re-enter Password

Enter a username of your choice. Your username cannot be changed once set. The username should be 8-10 characters and cannot be an email address, SSN, or contain a space, or a special character (!@#%&\*~.).

**Password Rules:**

- Between 8 and 32 characters long
- Must contain at least one numeric and one special character (!@#%&\*~.)
- At least one uppercase and at least one lowercase letter
- Matching password must be re-entered.

Email  [Edit](#)

#### Choose a Site Phrase

Create a phrase that you will recognize when you login

#### Choose a Site Image

Select an image that you will recognize when you login



[Choose Your Site Image](#)

[IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

14. You should received a message that you have successfully verified your identity and secured your profile.

Click "Continue".

**IRS**

## Success!

You've successfully verified your identity and created a secure user profile.

[IRS Privacy Policy](#) | [Security Code Terms and Condition](#)

15. Security Information.

Review and click "Continue".

**IRS**

## Online Security Information

### Security Announcement

The IRS will send email notifications to confirm registration and profile changes, but will never send unsolicited e

[IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

# Directions for Requesting an IRS Tax Transcript

16. In the “select a reason you need a transcript,” choose Federal Tax.

You do not need to provide a “Customer File Number”.

Click “Go” to proceed.

IRS

Signed in as **Your Name** | Profile | Sign Out

Welcome, **Your Name**

### Get Transcript

Select a reason you need a transcript: Federal Tax

Customer File Number: ?

GO >

IRS Privacy Policy | Privacy Notice | Accessibility

ice-webapp (version 19.7.9)

17. Under the “Tax Return Transcript” box, click on the most recent year.

Your tax return transcript will open. Check your pop-up blocker if your transcript does not open.

IRS

Signed in as: -- | Profile | Sign Out

Welcome,

### Get Transcript

Select a reason you need a transcript: Federal Tax

Customer File Number: ?

GO >

You selected: **Federal Tax**  
We suggest you download: **Record of Account Transcript**

Below are the transcripts and years available.

Return Transcript	Record of Account Transcript
2018	2018
2017	2017
2016	2016
2015	2015

**Glossary**

**Return Transcript**  
Tax Return Transcripts show most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and

# Directions for Requesting an IRS Tax Transcript

## 18. Sample Tax Return Transcript.

- You are only required to submit the first page of your tax return transcript.
- The highlighted sections are sections that you cannot blackout.
- You may black out all financial information as indicated on the sample tax return transcript.



## Internal Revenue Service United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Request Date: 10-03-2019  
Response Date: 10-03-2019  
Tracking Number: 100473790282

### Tax Return Transcript

SSN Provided: XXX-XX-  
Tax Period Ending: Dec. 31, 2018

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

SSN: XXX-XX-  
SPOUSE SSN:

#### NAME(S) SHOWN ON RETURN:

ADDRESS: PO BOX

#### FILING STATUS: Head of Household

FORM NUMBER: 1040  
CYCLE POSTED: 20190605  
RECEIVED DATE: Apr. 15, 2019  
REMITTANCE: \$0.00  
EXEMPTION NUMBER: 02  
OTHER DEPENDENT CREDIT TOTAL ELIGIBLE PER COMPUTER: 01  
OTHER DEPENDENT CREDIT TOTAL ELIGIBLE VERIFIED: 00  
EXEMPTION NUMBER: 2

DEPENDENT 1 NAME CTRL: XXX-XX-  
DEPENDENT 1 SSN:  
DEPENDENT 2 NAME CTRL:  
DEPENDENT 2 SSN:  
DEPENDENT 3 NAME CTRL:  
DEPENDENT 3 SSN:  
DEPENDENT 4 NAME CTRL:  
DEPENDENT 4 SSN:

PTIN:  
PREPARER EIN:

#### Income

WAGES, SALARIES, TIPS, ETC: \$  
TAXABLE INTEREST INCOME: SCH B: \$0.00  
TAX-EXEMPT INTEREST: \$0.00  
ORDINARY DIVIDEND INCOME: SCH B: \$5.00  
QUALIFIED DIVIDENDS: \$5.00  
REFUNDS OF STATE/LOCAL TAXES: \$0.00  
ALIMONY RECEIVED: \$0.00  
BUSINESS INCOME OR LOSS (Schedule C): \$0.00  
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER: \$  
CAPITAL GAIN OR LOSS: (Schedule D): \$0.00  
CAPITAL GAINS OR LOSS: SCH D PER COMPUTER: \$0.00  
OTHER GAINS OR LOSSES (Form 4797): \$0.00  
TOTAL IRA DISTRIBUTIONS: \$0.00  
TAXABLE IRA DISTRIBUTIONS: \$0.00  
IRAs, PENSIONS AND ANNUITIES: \$0.00  
TAXABLE IRAs, PENSIONS AND ANNUITIES: \$0.00  
SCHEDULE 2 INDICATOR: .0  
SCHEDULE 3 INDICATOR: .0  
ADDITIONAL INCOME: \$0.00  
ADDITIONAL INCOME PER COMPUTER: \$  
REFUNDABLE CREDITS PER COMPUTER: \$0.00  
REFUNDABLE EDUCATION CREDIT PER COMPUTER: \$0.00  
QUALIFIED BUSINESS INCOME DEDUCTION: \$  
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E): \$0.00  
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E) PER COMPUTER: \$0.00  
RENT/ROYALTY INCOME/LOSS PER COMPUTER: \$0.00  
ESTATE/TRUST INCOME/LOSS PER COMPUTER: \$0.00  
PARTNERSHIP/S-CORP INCOME/LOSS PER COMPUTER: \$0.00  
FARM INCOME OR LOSS (Schedule F): \$0.00  
FARM INCOME OR LOSS (Schedule F) PER COMPUTER: \$0.00  
UNEMPLOYMENT COMPENSATION: \$0.00  
TOTAL SOCIAL SECURITY BENEFITS: \$0.00  
TAXABLE SOCIAL SECURITY BENEFITS: \$0.00  
TAXABLE SOCIAL SECURITY BENEFITS PER COMPUTER: \$0.00  
OTHER INCOME: \$0.00  
SCHEDULE EIC SE INCOME PER COMPUTER: \$0.00  
SCHEDULE EIC EARNED INCOME PER COMPUTER: \$0.00

If you have questions or need assistance, contact Employee Benefits at (813) 794-2253 or email

[mybenefits@pasco.k12.fl.us](mailto:mybenefits@pasco.k12.fl.us)