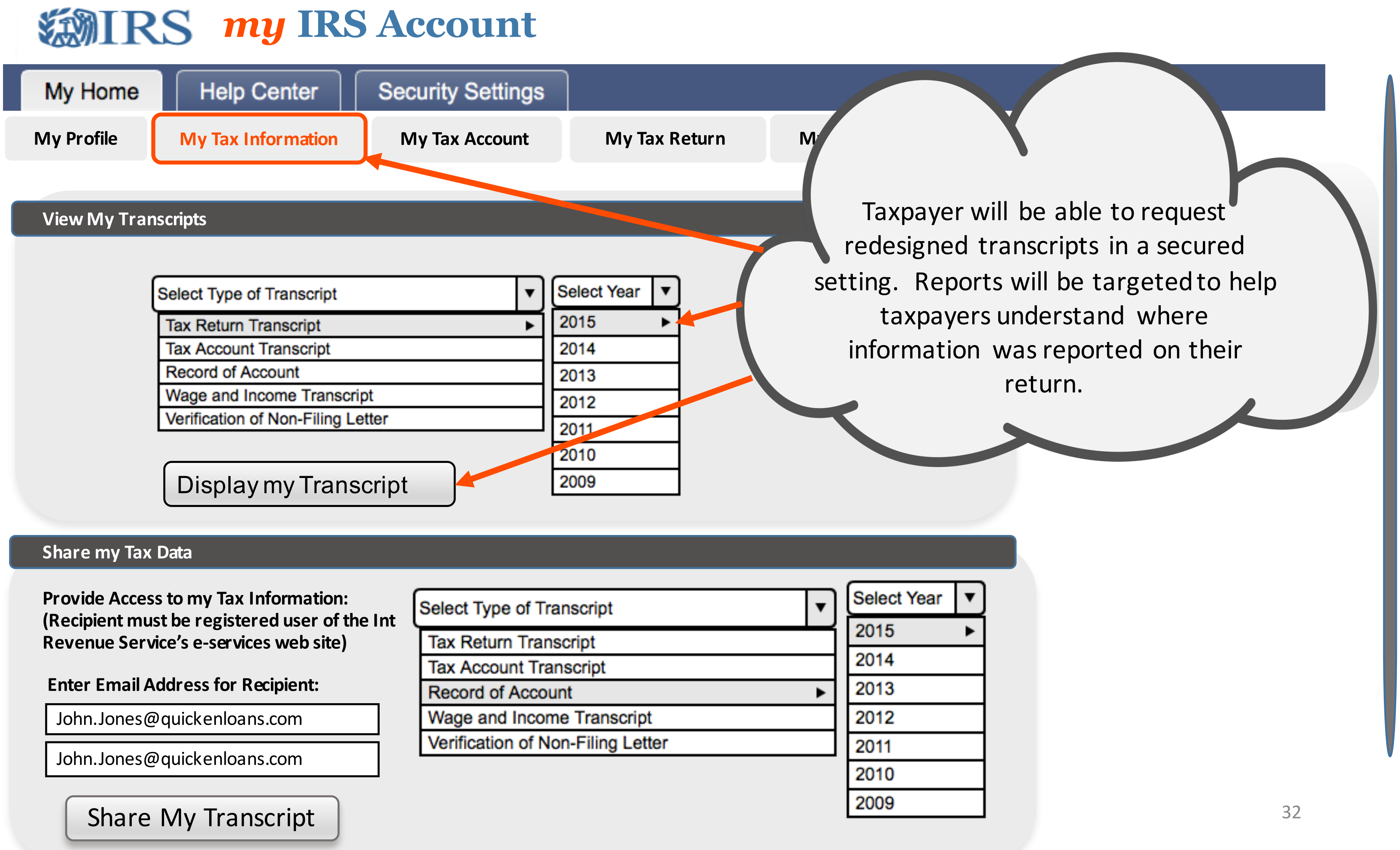
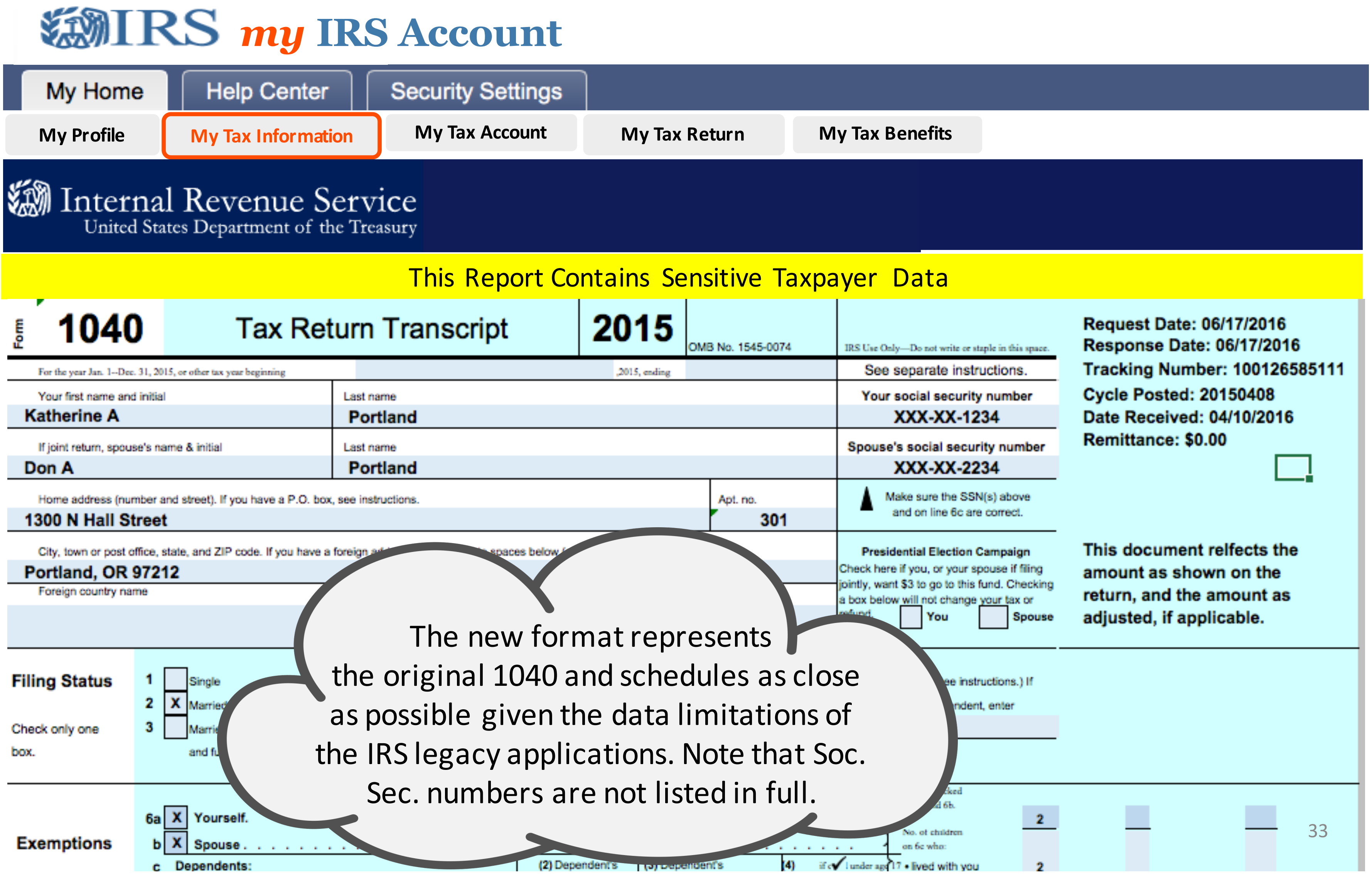
my Tax Information

Scenarios for *my* Tax Information

- Taxpayer wants to review data from the return as originally filed. She thinks she may have missed a subtraction.
  - There is a new Return Transcript report that more closely resembles the IRS 1040. Two columns have been added to reflect the "per computer" amount (on report as the "adjusted amount") and the IRS "verified" amount
  - Report is formatted to look like the 1040 return as filed so that taxpayer can better understand the source of the data.
  - Report can be printed, saved or the data downloaded.
- Taxpayer wants to review the Tax Source Documents for Wages and Income.
- Taxpayer has applied for a loan and wants to share the Record of Account Transcript with a Mortgage Broker who has signed up as an "IRS Approved Partner"
  - Taxpayer selects report, indicates the recipient.
- Mortgage broker receives email notifying of access to the data then logs on and reviews the transcript.
  - Report has been updated to better reflect the actual tax account and tax return as it has been amended by taxpayer and/or updated by the IRS/computer.

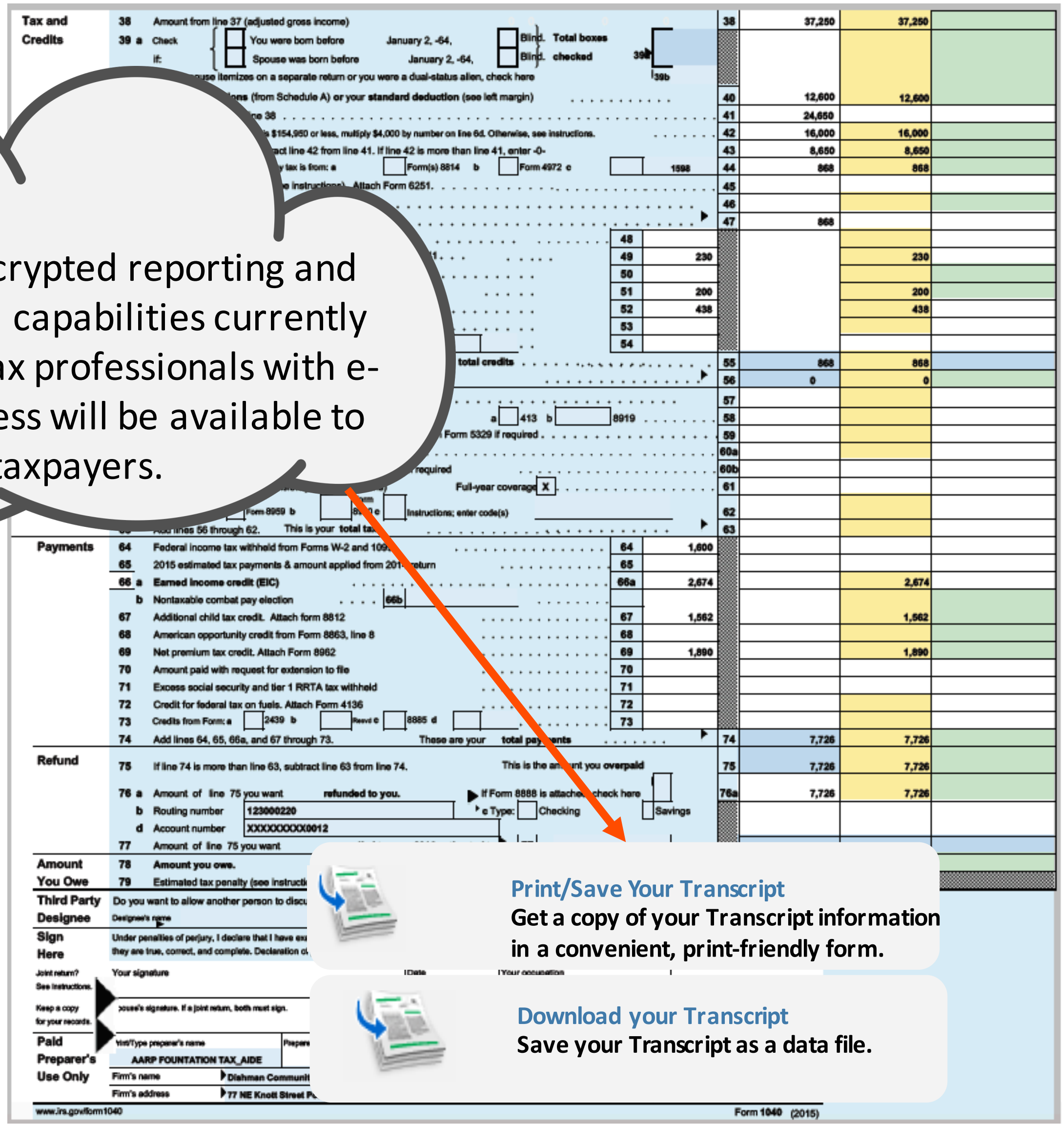

IRS my IRS Account
My Home
Help Center
Security Settings
My Profile
My Tax Information
My Tax Account
My Tax Return
View My Transcripts
Select Type of Transcript
Tax Return Transcript
Tax Account Transcript
Record of Account
Wage and Income Transcript
Verification of Non-Filing Letter
Select Year
2015
2014
2013
2012
2011
2010
2009
Display my Transcript
Taxpayer will be able to request redesigned transcripts in a secured setting. Reports will be targeted to help taxpayers understand where information was reported on their return.
Share my Tax Data
Provide Access to my Tax Information:
(Recipient must be registered user of the Int Revenue Service's e-services web site)
Enter Email Address for Recipient:
John.Jones@quickenloans.com
John.Jones@quickenloans.com
Select Type of Transcript
Tax Return Transcript
Tax Account Transcript
Record of Account
Wage and Income Transcript
Verification of Non-Filing Letter
Select Year
2015
2014
2013
2012
2011
2010
2009
Share My Transcript



The new format represents the original 1040 and schedules as close as possible given the data limitations of the IRS legacy applications. Note that Soc. Sec. numbers are not listed in full.

This is a continuation of the report available by scrolling. The new columns reflect the original return as filed, the changes made by IRS calculations (computer) and "verified" data from the IRS. The report does not include amendments or other adjustments.

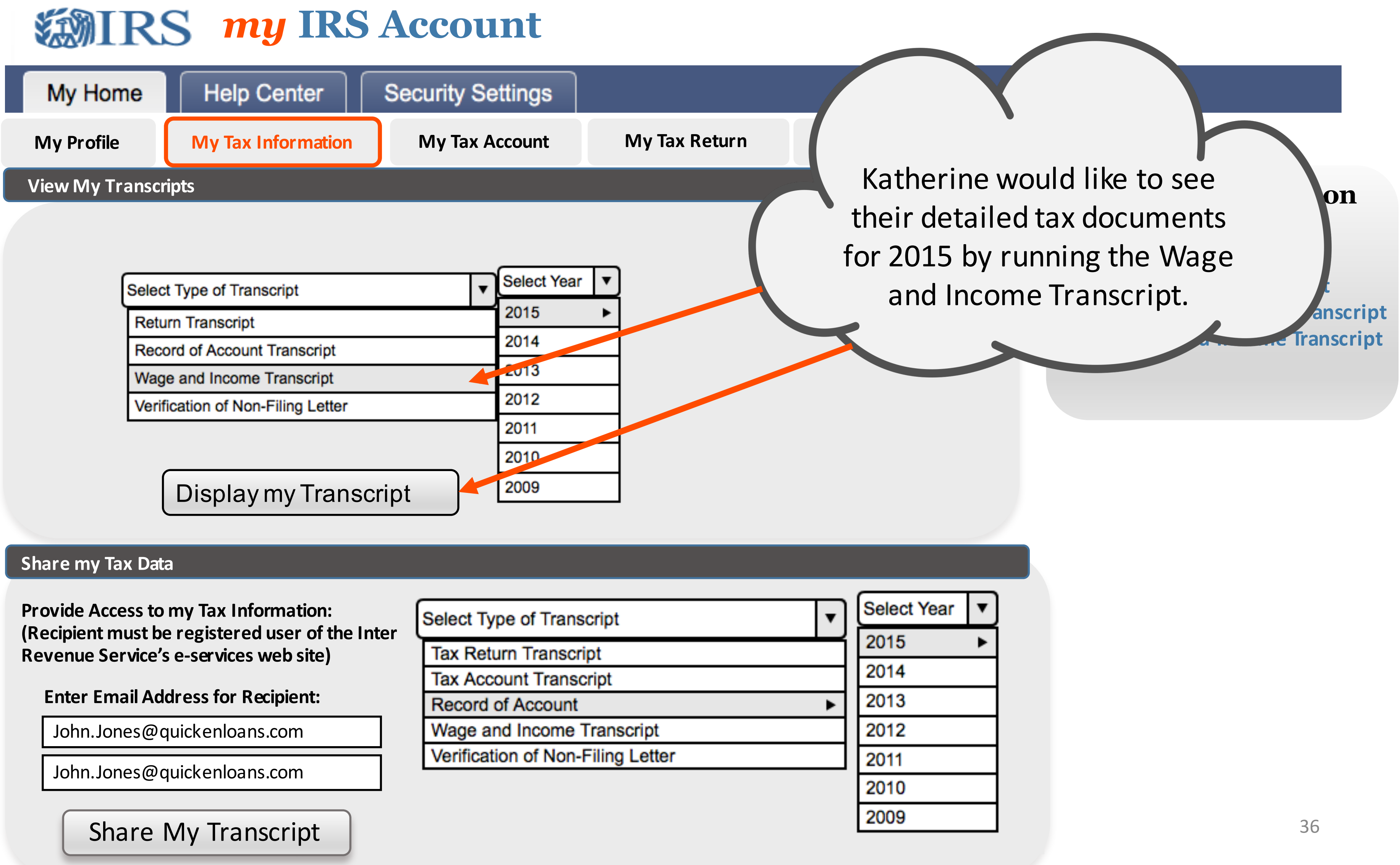
						Original Return	Adjusted Return	Verified Return
Income	7	Wages ... Form(s) W-2			7	37,000		
	8 a				8a	50		
				100				
	9				9a	200		
					10			
					11			
					12			
					13			
					14			
					15b			
					16b			
					17			
					18			
					19			
					20b			
	21				21			
	22	Combi...		37,000	22	37,250	37,250	
Adjustments to Income	23	Educator expe...	23					
	24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24					
	25	Health savings account deduction. Attach Form 8889	25					
	26	Moving expenses. Attach Form 3903	26					
	27	Deductible part of self-employment tax. Attach Schedule SE	27					
	28	Self-employed SEP, SIMPLE, and qualified plans	28					
	29	Self-employed health insurance deduction	29					
	30	Penalty on early withdrawal of savings	30					
	31 a	Alimony paid b Recipient's SSN						
	32	IRA deduction	32					
	33	Student loan interest deduction	33					
	34	Tuition and fees. Attach Form 8917	34					
	35	Domestic production activities deduction. Attach Form 8903	35					
	36	Add lines 23 through 35			36	0	0	
	37	Subtract line 36 from line 22. This is your **adjusted gross inco**...			37	37,250	37,250	



Secured/encrypted reporting and downloading capabilities currently available to tax professionals with e-Services access will be available to taxpayers.

Print/Save Your Transcript
Get a copy of your Transcript information in a convenient, print-friendly form.

Download your Transcript
Save your Transcript as a data file.


IRS my IRS Account
My Home
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My Profile
My Tax Information
My Tax Account
My Tax Return
View My Transcripts
Select Type of Transcript
Return Transcript
Record of Account Transcript
Wage and Income Transcript
Verification of Non-Filing Letter
Select Year
2015
2014
2013
2012
2011
2010
2009
Display my Transcript
Katherine would like to see their detailed tax documents for 2015 by running the Wage and Income Transcript.
Share my Tax Data
Provide Access to my Tax Information:
(Recipient must be registered user of the Inter Revenue Service's e-services web site)
Enter Email Address for Recipient:
John.Jones@quickenloans.com
John.Jones@quickenloans.com
Share My Transcript
Select Type of Transcript
Tax Return Transcript
Tax Account Transcript
Record of Account
Wage and Income Transcript
Verification of Non-Filing Letter
Select Year
2015
2014
2013
2012
2011
2010
2009

IRS *my* IRS Account

My Home | Help Center | Security Settings

My Profile | **My Tax Information** | My Tax Account | My Tax Return | My Tax Benefits

Internal Revenue Service
United States Department of the Treasury

This Report Contains Sensitive Taxpayer Data

Response Date: **6/10/17**

Tracking Number: 100126596833

Wage and Income Transcript

Social Security Number: XXX-XX-1234

Wage and Income Summary

Federal Tax Withheld:	1,[illegible].00
Wages:	37,000.00
Allocated Tips:	
Interest:	50.00
Mortgage Interest Paid:	
Points Paid:	
Prior Year Refund:	
Savings Bonds:	
Dividends:	200.00
Pensions and Annuities:	
IRA Contributions:	
Non-employee Compensation:	
Capital Gains:	
Real Estate Sales:	
Gross Distributions:	
Taxable Amount:	
Stocks & Bonds:	
Unemployment Compensation:	
Deferred Compensation:	
FICA Tax Withheld:	2,356.00
Medicare Withheld:	551.00
Medicare Wages:	38,000.00
Taxable FICA Wages:	38,000.00
State Income Tax Withheld:	800.00
Qualified Tuition and Related Expenses:	
Advanced Premium Tax Credit:	

New Wage and Income transcript will include ***all*** data necessary for completing the tax return. In particular, state income tax withheld will be available. New summary report will make it easier to see if any source is missing in a return.

The new format will display the data in the format of the forms, not just a list format. New source data such as State Income Tax will be included. This will also standardize statements for taxpayers.

a. Employee's social security number
XXX-XX 1234

b. Employer identification number (EIN)
93-0546890

c. Employer's name, address, city state and ZIP Code
MT. HOOD COMMUNITY COLLEGE
26000 SE STARK ST
OR

1. Wages, tips, other compensation $25,000.00	2. Federal income tax withheld $1,000.00
3. Social security wages $26,000.00	4. Social security tax withheld $1,612.00
5. Medicare wages and tips $26,000.00	6. Medicare tax withheld $377.00
7. Social security tips	8. Allocated tips
9.	10. Dependant care benefits
nqualified plans	12a. See instructions for box 12 D $1,000.00
utory oyee X · Retiremei Plan X · Third-party sickpay	12b.
er	12c.
	12d.

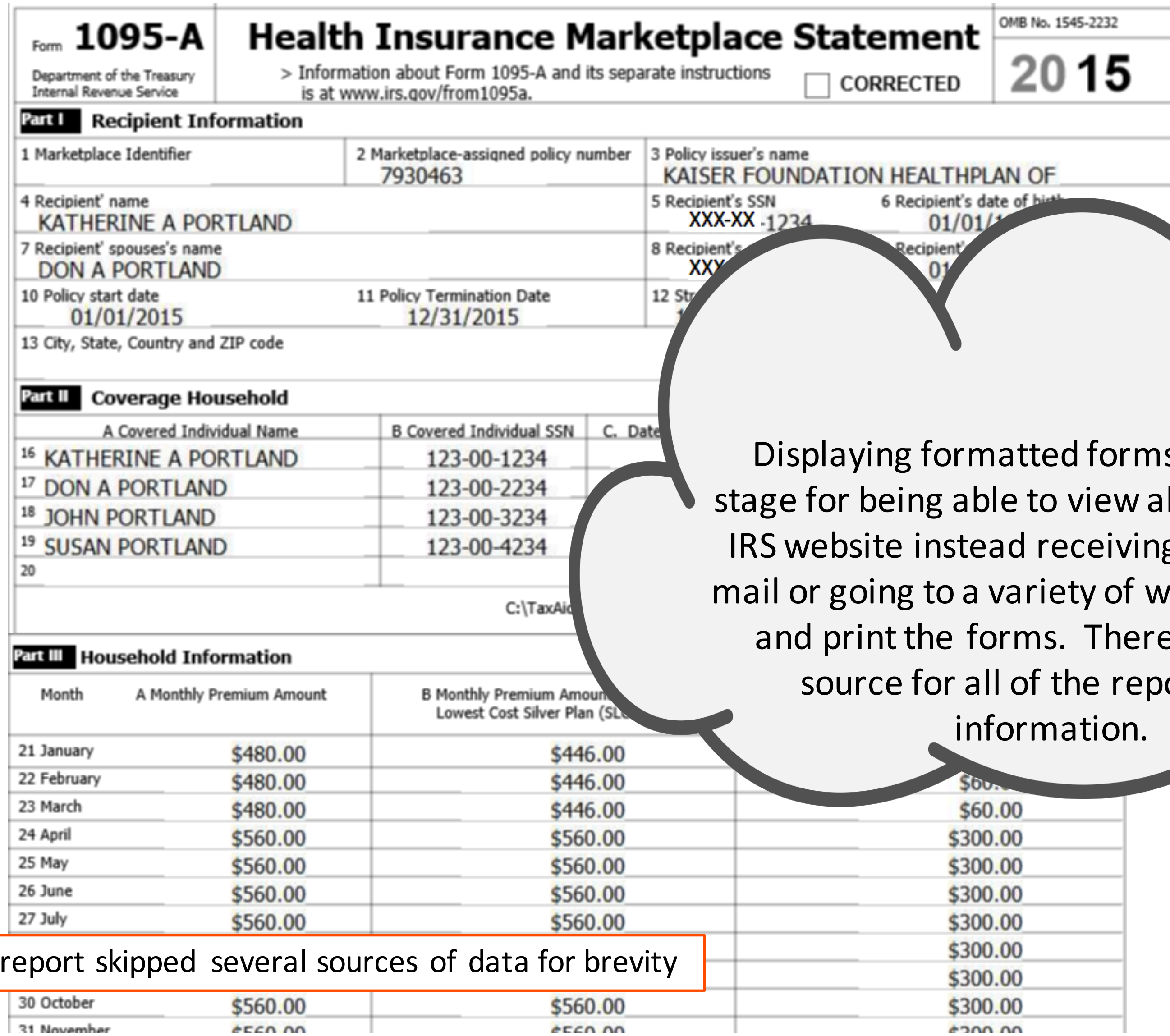
15. State	Employer's state ID number	16. State wages, tips, etc.	17. State income tax	18. Local wages, tips, etc.	19. Local income tax	20. Locality name
OR	1234554	$25,000.00	$500.00			

Form **W-2** **Wage and Tax Statement** **2015**

C:\TaxAideForms\W2_KATHERINE_A_PORTLAND_#000.taxai

Copy B - To Be FIled With Employee's FEDERAL Tax Return.

This information is being furnished to the Internal Revenue Service.



Form **1095-A**
Department of the Treasury
Internal Revenue Service

Health Insurance Marketplace Statement

> Information about Form 1095-A and its separate instructions is at www.irs.gov/from1095a.

☐ CORRECTED

OMB No. 1545-2232

2015

Part I Recipient Information

1 Marketplace Identifier

2 Marketplace-assigned policy number
7930463

3 Policy issuer's name
KAISER FOUNDATION HEALTHPLAN OF

4 Recipient' name
KATHERINE A PORTLAND

5 Recipient's SSN
XXX-XX -1234

6 Recipient's date of birth
01/01/1

7 Recipient' spouses's name
DON A PORTLAND

8 Recipient's
XXX

Recipient'
01

10 Policy start date
01/01/2015

11 Policy Termination Date
12/31/2015

12 St

13 City, State, Country and ZIP code

Part II Coverage Household

	A Covered Individual Name	B Covered Individual SSN	C. Date
16	KATHERINE A PORTLAND	123-00-1234	
17	DON A PORTLAND	123-00-2234	
18	JOHN PORTLAND	123-00-3234	
19	SUSAN PORTLAND	123-00-4234	
20			

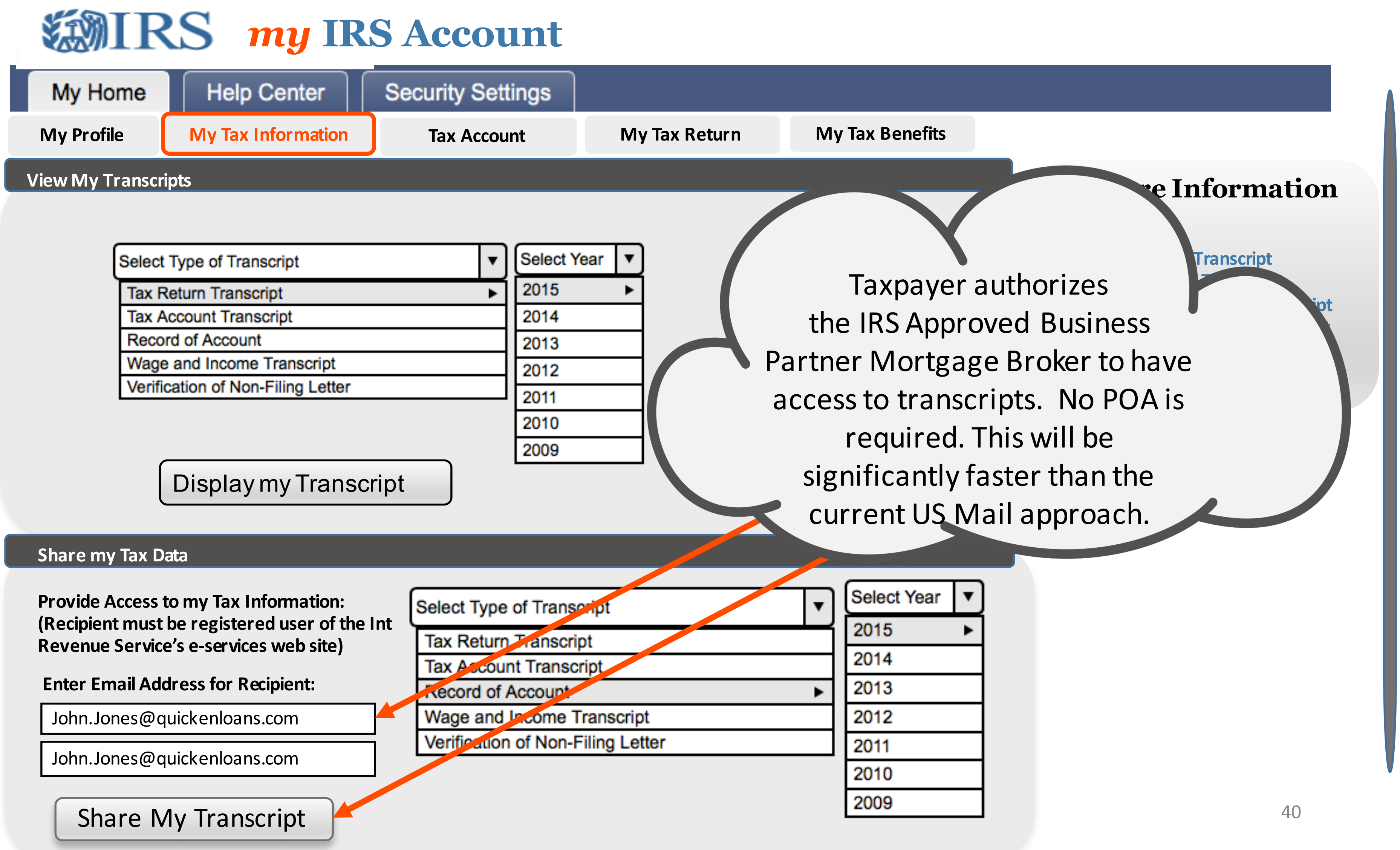
C:\TaxAi

Part III Household Information

Month	A Monthly Premium Amount	B Monthly Premium Amount Lowest Cost Silver Plan (SL	
21 January	$480.00	$446.00	
22 February	$480.00	$446.00	$60.
23 March	$480.00	$446.00	$60.00
24 April	$560.00	$560.00	$300.00
25 May	$560.00	$560.00	$300.00
26 June	$560.00	$560.00	$300.00
27 July	$560.00	$560.00	$300.00
			$300.00
			$300.00
30 October	$560.00	$560.00	$300.00
31 November	$560.00	$560.00	$300.00

Displaying formatted forms will set the stage for being able to view all forms on the IRS website instead receiving forms in the mail or going to a variety of websites to find and print the forms. There will be one source for all of the reported tax information.

Note: This sample report skipped several sources of data for brevity


IRS my IRS Account
My Home
Help Center
Security Settings
My Profile
My Tax Information
Tax Account
My Tax Return
My Tax Benefits
View My Transcripts
Select Type of Transcript
Tax Return Transcript
Tax Account Transcript
Record of Account
Wage and Income Transcript
Verification of Non-Filing Letter
Select Year
2015
2014
2013
2012
2011
2010
2009
Display my Transcript
Taxpayer authorizes the IRS Approved Business Partner Mortgage Broker to have access to transcripts. No POA is required. This will be significantly faster than the current US Mail approach.
Share my Tax Data
Provide Access to my Tax Information:
(Recipient must be registered user of the Int Revenue Service's e-services web site)
Enter Email Address for Recipient:
John.Jones@quickenloans.com
John.Jones@quickenloans.com
Share My Transcript
Select Type of Transcript
Tax Return Transcript
Tax Account Transcript
Record of Account
Wage and Income Transcript
Verification of Non-Filing Letter
Select Year
2015
2014
2013
2012
2011
2010
2009

Mortgage Broker Receives E-mail Notification

To: John.L.Mortgage@QuickenLoans.com

Cc:

Bcc:

Subject: IRS e-Services Notification

From: e-Services@irs.org

You have been given access to a Tax Transcript for Katherine A Portland. Please follow the link to our secured Mail Server.

Tax.Transcript@irs.gov/JOHNLMORTGAGE

Mortgage Broker receives personal email with link to IRS secured encrypted email Server.

On the IRS highly secured and encrypted system, the Mortgage Broker picks up the email with a link to the Transcript.

To: JOHNLMORTGAGE1

Cc:

Bcc:

Subject: IRS e-Services Notification

From: e-Services@irs.org

Here is the link to the Tax Return Transcript for Katherine A Portland.

Link to Tax Report of Account Transcript

IRS *e-Services*

Welcome, John! You last signed in on May 02, 2016 at 10:28AMEDT.

My Home | Help Center | Security Settings

My Profile | Tax Information

Tax Transcripts

Taxpayer Name	Date	Tax Year	Type of Transcript	Action
Katherine A Portland	06/15/2016	2015	Record of Account	View Delete
Katherine A Portland	06/15/2016	2014	Record of Account	View Delete
Katherine A Portland	06/15/2016	2013	Record of Account	View Delete
Sidney R Apple	03/21/2016	2015	Record of Account	View Delete
Sidney R Apple	03/21/2016	2014	Record of Account	View Delete
Sidney R Apple	03/21/2016	2012	Record of Account	View Delete

Mortgage Broker selects “View” to select the most up-to-date return of the Mortgage client.

More Information

- Tax Return Transcript
- Tax Account Transcript
- Record of Account Transcript
- Wage and Income Transcript

IRS *e-Services*

My Home | Help Center | Security Settings

My Profile | Tax Transcripts

Internal Revenue Service
United States Department of the Treasury

This Report Contains Sensitive Taxpayer Data

Form **1040** Record of Account **2015** OMB No. 1545-0074

For the year Jan. 1–Dec. 31, 2015, or other tax year beginning 2015, ending

See separate instructions.

Your first name and initial	Last name	Your social security number
Katherine A	Portland	XXX-XX-1234
If joint return, spouse's name & initial	Last name	Spouse's social security number
Don A	Portland	XXX-XX-2234

Home address (number and street). If you have a P.O. box, see instructions. **1300 N Hall Street** Apt. no. **301**

Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). **Portland, OR 97212**

Foreign country name | Foreign province/state/county | Foreign postal code

Presidential Election Campaign
Check here if you, or your spouse if filing jointly, want $3 to go to this fund. ☐ You ☐ Spouse

Request Date: 06/17/2016
Response Date: 06/17/2016
Tracking Number: 100282305272
Cycle Posted: 20150408
Date Received: 04/10/2016
Remittance: $0.00

This document relfects the amount as shown on the return, and the amount as adjusted, if applicable.

Account Balance:	0	
Accrued Interest:	0	**As of: 04/30/2015**
Accrued Penalty:	0	**As of: 04/30/2015**

Adjusted Gross Income:	37,100.00
Taxable Income:	8,500.00
Tax per return:	0.00
SE taxable Income taxpayer:	0.00
SE Taxable Income spouse:	0.00

Account	Date	Code	Transactions
Tax Year 2013	April 15, 2015	150	Tax return filed 80211-411-50911-6
	April 15, 2015	806	W-2 or 1099 withholding
	April 15, 2015	766	Credit to your account
	April 15, 2015	846	Refund Issued

New report blends the Account Transcript with the new multiple column Transcript report in a 1040 format.

Filing Status

Check only one

1 ☐ Single
2 ☒ Married filing joint return (even if only one had income)
3 ☐ Married filing separate return. Enter spouse's SSN above ▶
4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your depe... this child's name here.

Exemptions

6a ☒ **Yourself.** If someone can claim you as a dependent, **do not** check box 6a
b ☒ **Spouse**
c **Dependents:**

If more than four dependents, see instructions and check here. ▶ ☐

(1) First name Last Name	(2) Dependent's social security number	(3) Dependent's relationship to you	If child qualifying for child tax credit
John Portland	XXX-XX-3234	SON	X
Susan Portland	XXX-XX-4234	DAUGHTER	X

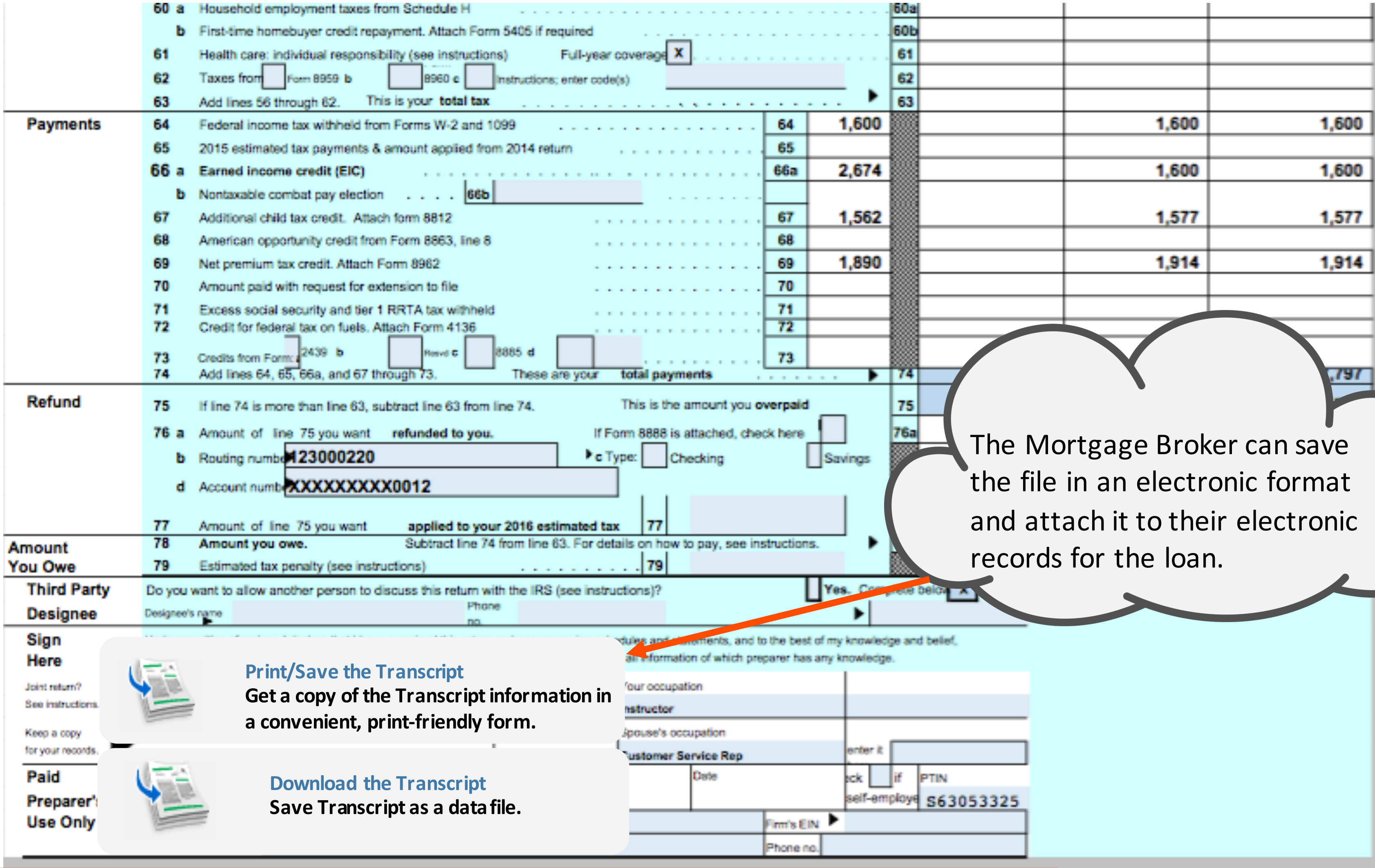
Dependents on 6c not entered above

d Total number of exemptions claimed . . . Add numbers on lines above ▶ 4

The report reflects the return as filed by the taxpayer, Amendments, and adjustments by the IRS.

Income

			Original Return	Amended Return	Final as Adjusted by IRS
7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	37,000	37,000	37,000
8 a	**Taxable** interest. Attach Schedule B if required.	8a	50	50	50
b	**Tax-exempt** interest. **Do not** include on line 8a — 8b 100				
9 a	Ordinary dividends. Attach Schedule B if required.	9a	200	200	200
b	Qualified dividends — 9b				
10	Taxable refunds, credits, or offsets of state and local income taxes	10			
11	Alimony received	11			
12	Business income or (loss). Attach Schedule C or C-EZ	12			
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here. ☐	13			
14	Other gains or (losses). Attach Form 4797.	14			
15 a	IRA distributions 15a 0 — b Taxable amount	15b			
16 a	Pensions and annuities 16a 0 — b Taxable amount	16b			
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E.	17			
18	Farm income or (loss). Attach Schedule F.	18			
19	Unemployment compensation	19			
20 a	Social security benefits 20a 0 — b Taxable amount	20b			
21	Other income. List type and amount.	21			
22	Combine the amounts in the far right column for lines 7 through 21. Earned 37,000	22	37,250	37,250	37,250



	60 a	Household employment taxes from Schedule H	60a		
	b	First-time homebuyer credit repayment. Attach Form 5405 if required	60b		
	61	Health care: individual responsibility (see instructions) Full-year coverage X	61		
	62	Taxes from Form 8959 b 8960 c Instructions; enter code(s)	62		
	63	Add lines 56 through 62. This is your **total tax**	63		
Payments	64	Federal income tax withheld from Forms W-2 and 1099 ... 64 **1,600**		**1,600**	**1,600**
	65	2015 estimated tax payments & amount applied from 2014 return ... 65			
	66 a	**Earned income credit (EIC)** ... 66a **2,674**		**1,600**	**1,600**
	b	Nontaxable combat pay election 66b			
	67	Additional child tax credit. Attach form 8812 ... 67 **1,562**		**1,577**	**1,577**
	68	American opportunity credit from Form 8863, line 8 ... 68			
	69	Net premium tax credit. Attach Form 8962 ... 69 **1,890**		**1,914**	**1,914**
	70	Amount paid with request for extension to file ... 70			
	71	Excess social security and tier 1 RRTA tax withheld ... 71			
	72	Credit for federal tax on fuels. Attach Form 4136 ... 72			
	73	Credits from Form: 2439 b Reserved c 8885 d ... 73			
	74	Add lines 64, 65, 66a, and 67 through 73. These are your **total payments**	74		
Refund	75	If line 74 is more than line 63, subtract line 63 from line 74. This is the amount you **overpaid**	75		
	76 a	Amount of line 75 you want **refunded to you.** If Form 8888 is attached, check here	76a		
	b	Routing number **123000220** c Type: Checking Savings			
	d	Account number **XXXXXXXXX0012**			
	77	Amount of line 75 you want **applied to your 2016 estimated tax** 77			
Amount You Owe	78	**Amount you owe.** Subtract line 74 from line 63. For details on how to pay, see instructions.			
	79	Estimated tax penalty (see instructions) 79			
Third Party Designee		Do you want to allow another person to discuss this return with the IRS (see instructions)? Yes. Complete below. X			
		Designee's name Phone no.			
Sign Here		...edules and statements, and to the best of my knowledge and belief, ...all information of which preparer has any knowledge.			
Joint return? See instructions. Keep a copy for your records.		Your occupation **Instructor** Spouse's occupation **Customer Service Rep**			
Paid Preparer's Use Only		Date Check if self-employed PTIN **S63053325** Firm's EIN Phone no.			

Print/Save the Transcript

Get a copy of the Transcript information in a convenient, print-friendly form.

Download the Transcript

Save Transcript as a data file.

The Mortgage Broker can save the file in an electronic format and attach it to their electronic records for the loan.

Note: This sample report skipped multiple pages, schedules and forms for brevity.

my Tax Account

Scenarios for *my* IRS Account

- Taxpayer can view the current year's account information.
  - The current tax year account balance is available.
  - If there is a balance due, balance and payment information is available.
- Taxpayer can also view the Tax Account Transcript data for up to 10 years. Detailed transactions are available.

IRS *my* IRS Account

My Home | Help Center | Security Set…

My Profile | My Tax Information | My Tax Ac… | …fits

Account Balances | Account Transactions

New online Tax Account information will be similar to a loan statement if there is a balance due. State and Federal legally enforceable past-due debts will also be visible.

Current Tax Year Account

Account Balance:	0	
Accrued Interest:	0	As of: 06/15/2015
Accrued Penalty:	0	As of: 06/15/2015

Adjusted Gross Income:	37,100.0…
Taxable Income:	8,500.00
Tax per return:	0.00
SE taxable Income taxpayer:	0.00
SE Taxable Income spouse:	0.00

Account Balances

Account Terms

Account Balance	$1,426.41	Pmt. Frequency	Monthly
Int. Rate	3.00%		
Monthly Payment	$44.17	Next Pmt. Due	6/30/15

Legally enforceable past-due debts

Unpaid federal tax liabilities	1,426.41
Past due child support	0.00
Past due debts owed to other federal a	0.00
Past due state income tax obligations	0.00
Past due unemployment	
Total	1,426.41

Transactions

Date	Description	Total	Principal	Interest	Penalty	Debit	Credit	Balance
4/15/15	Account Balance					1,518.93		1,518.93
4/15/16	Payment	50.00	46.20	3.80		3.80	46.20	1,472.73
5/30/16		50.00	46.32	3.68		3.68	46.32	1,426.41

Pay Online Directly from Your Bank Account

…e an individual taxpayer, IRS Direct Pay offers you a …ure electronic payment method.

IRS Direct Pay

…Ways You Can Pay

- …tronic Federal Tax Payment System (…est option for businesses, enrollment required)
- Electronic Funds Withdrawal (during e-filing)
- Same-day wire (bank fees may apply)
- Check or money order
- Cash (at a retail partner)

Pay with Your Debit or Credit Card

Choose an approved payment processor to make a secure tax payment online or by phone.

Pay by Card

Can't Pay Now?

- Meet your tax obligation in monthly installments by applying for an online payment agreement
- Find out if you qualify for an offer in compromise -- a way to settle your tax debt for less than the full amount
- Request that we temporarily delay collection until your financial situation improves

IRS *my* IRS Account

My Home | Help Center | Security Settings

My Profile | My Tax Information | My Tax Account | My Tax Return | My Tax Benefits

Account Balances | Account Transactions

Account	Date	Transaction	Amount
> Tax Year 2016			-500.00
> Tax Year 2015			1,461.49
V Tax Year 2014			0.00
	4/15/15	Credit you chose to apply to following tax period's taxes	735.00
	4/15/15	Tax return filed	2,200.00
	4/15/15	Credit to your account	-350.00
	4/15/15	W-2 or 1099 withholding	-300.00
	1/10/15	Estimated tax payment	-500.00
	9/30/14	Estimated tax payment	-500.00
	6/15/14	Estimated tax payment	-500.00
	4/17/14	Estimated tax payment	-500.00
	4/15/14	Credit you chose to apply from prior tax period	-285.00
			0.00
> Tax Year 2013			0.00
> Tax Year 2012			0.00
> Tax Year 2011			0.00
> Tax Year 2010			0.00
> Tax Year 2009			0.00
> Tax Year 2008			0.00
> Tax Year 2007			0.00
> Tax Year 2006			0.00

The new Account Transaction functionality will show detail of all actions on a taxpayers account. This will reflect data captured for the Account Statement