

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.
 - All forms and schedules would be included.
- 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.

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View My Transcripts

Select Type of Transcript

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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

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

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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.

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Internal Revenue Service
United States Department of the Treasury

This Report Contains Sensitive Taxpayer Data

Form	1040	Tax Return Transcript	2015	OMB No. 1545-0074	IRS Use Only—Do not write or staple in this space.	Request Date: 06/17/2016 Response Date: 06/17/2016 Tracking Number: 100126585111 Cycle Posted: 20150408 Date Received: 04/10/2016 Remittance: \$0.00
For the year Jan. 1–Dec. 31, 2015, or other tax year beginning		,2015, ending		See separate instructions.		
Your first name and initial Katherine A		Last name Portland		Your social security number XXX-XX-1234		
If joint return, spouse's name & initial Don A		Last name Portland		Spouse's social security number 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, see instructions. Spaces below. Portland, OR 97212				Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse		This document reflects the amount as shown on the return, and the amount as adjusted, if applicable.
Foreign country name						
Filing Status	1 <input type="checkbox"/> Single 2 <input checked="" type="checkbox"/> Married 3 <input type="checkbox"/> Married and filing separately Check only one box.					
Exemptions	6a <input checked="" type="checkbox"/> Yourself. b <input checked="" type="checkbox"/> Spouse. c Dependents: (2) Dependents (3) Dependents (4) if under age 17 • lived with you 2 2 33					

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.

			Original Return	Adjusted Return	Verified Return
Income	7	Wages, salaries, tips, etc. (Form(s) W-2)	7	37,000	
	8 a	Unemployment compensation	8a	50	
	9	Dividends and capital gains distributions	9a	200	
	10	Interest on U.S. government securities	10		
	11	Interest on state and local government securities	11		
	12	Interest on other securities	12		
	13	Interest on tax-exempt securities	13		
	14	Interest on other tax-exempt securities	14		
	15b	Other income	15b		
	16b	Other income	16b		
	17	Other income	17		
	18	Other income	18		
	19	Other income	19		
	20b	Other income	20b		
	21	Other income	21		
	22	Combined income	22	37,250	37,250
Adjustments to Income	23	Educator expenses	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)	31		
	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 income	37	37,250	37,250

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.

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

The image shows a screenshot of the IRS Form 1040 (2015) with a cloud callout and two text boxes. The cloud callout contains the text: "Secured/encrypted reporting and downloading capabilities currently available to tax professionals with e-Services access will be available to taxpayers." The text boxes contain the following information:

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.

The screenshot shows the following sections of the form:

- Tax and Credits:** Lines 38 through 54. Line 38 shows adjusted gross income of 37,250. Line 40 shows standard deduction of 12,000. Line 41 shows taxable income of 24,850. Line 42 shows tax before credits of 16,000. Line 43 shows tax after credits of 8,650. Line 44 shows total tax of 868.
- Payments:** Lines 64 through 73. Line 64 shows federal income tax withheld of 1,600. Line 65 shows 2015 estimated tax payments of 2,674. Line 66a shows earned income credit of 2,674. Line 67 shows additional child tax credit of 1,562. Line 68 shows American opportunity credit of 1,562. Line 69 shows net premium tax credit of 1,890. Line 70 shows amount paid with request for extension to file. Line 71 shows excess social security and tier 1 RRTA tax withheld. Line 72 shows credit for federal tax on fuels. Line 73 shows credits from Form 8865 of 885.
- Refund:** Line 75 shows refund of 7,726.
- Amount You Owe:** Line 78 shows amount you owe of 7,726.
- Third Party Designee:** Lines 79 through 83.

Note: For brevity, this report did not include the Schedules and Forms.

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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	Select Year
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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:	1,000.00
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 documents are missing in a return.

a. Employee's social security number XXX-XX 1234						
b. Employer identification number (EIN) 93-0546890		1. Wages, tips, other compensation \$25,000.00	2. Federal income tax withheld \$1,000.00			
c. Employer's name, address, city state and ZIP Code MT. HOOD COMMUNITY COLLEGE 26000 SE STARK ST PORTLAND, OR 97201		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			
		11. Qualified plans	12a. See instructions for box 12 D \$1,000.00			
		12b.				
		12c.				
		12d.				
15. State OR	Employer's state ID number 1234554	16. State wages, tips, etc. \$25,000.00	17. State income tax \$500.00	18. Local wages, tips, etc.	19. Local income tax	20. Locality name

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.

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

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

This information is being furnished to the Internal Revenue Service.

C:\TaxAideForms\W2_KATHERINE_A_PORTLAND_#000.taxaid

Form 1095-A		Health Insurance Marketplace Statement		OMB No. 1545-2232
Department of the Treasury Internal Revenue Service		> Information about Form 1095-A and its separate instructions is at www.irs.gov/form1095a .		<input type="checkbox"/> CORRECTED 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's name KATHERINE A PORTLAND		5 Recipient's SSN XXX-XX-1234		6 Recipient's date of birth 01/01/1980
7 Recipient's spouse's name DON A PORTLAND		8 Recipient's SSN XXX-XX-1234		9 Recipient's date of birth 01/01/1980
10 Policy start date 01/01/2015		11 Policy Termination Date 12/31/2015		12 Street address
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:\TaxAid				
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		
23 March	\$480.00	\$446.00		
24 April	\$560.00	\$560.00		
25 May	\$560.00	\$560.00		
26 June	\$560.00	\$560.00		
27 July	\$560.00	\$560.00		
		\$300.00		
		\$300.00		
		\$300.00		
30 October	\$560.00	\$560.00		
31 November	\$560.00	\$560.00		

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

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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:

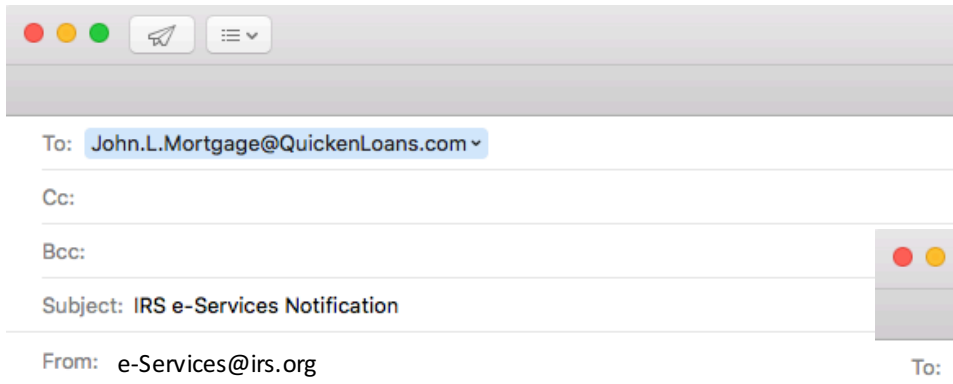
John.Jones@quickenloans.com

John.Jones@quickenloans.com

Share My Transcript

Select Type of Transcript	Select Year
Tax Return Transcript	2015
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Verification of Non-Filing Letter	2011
	2010
	2009

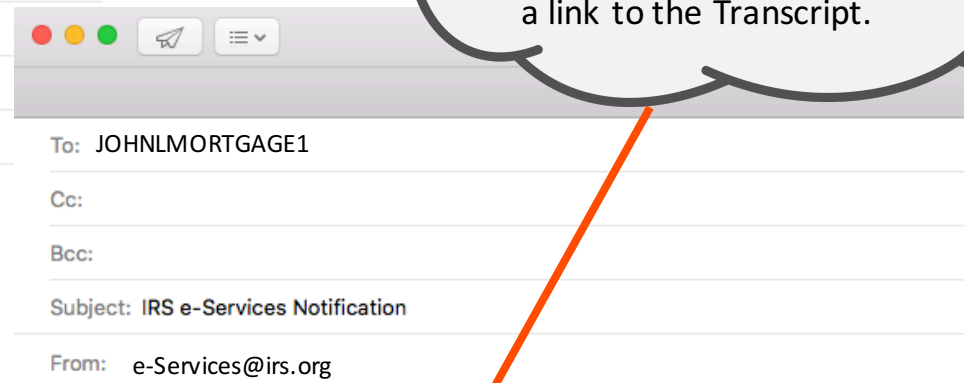
Mortgage Broker Receives E-mail Notification



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/JOHNLDMORTGAGE

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



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

[Link to Tax Report of Account Transcript](#)

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

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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

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

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This Report Contains Sensitive Taxpayer Data

Form	1040	Record of Account	2015	CMB No. 1545-0074	Use Only—Do not write or stamp in this space
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		Request Date: 06/17/2016 Response Date: 06/17/2016 Tracking Number: 100282305272 Cycle Posted: 20150408 Date Received: 04/10/2016 Remittance: \$0.00
Katherine A	Portland		XXX-XX-1234		
If joint return, spouse's name & initial	Last name		Spouse's social security number		This document reflects the amount as shown on the return, and the amount as adjusted, if applicable.
Don A	Portland		XXX-XX-2234		
Home address (number and street). If you have a P.O. box, see instructions.			Apt. no.	▲ Make sure the SSN(s) above and on line 5c are correct.	
1300 N Hall Street			301	Presidential Election Campaign	
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).			Check here if you, or your spouse if filing jointly, want \$3 to go to this fund.		
Portland, OR 97212			<input type="checkbox"/> You <input type="checkbox"/> Spouse		
Foreign country name		Foreign province/state/county	Foreign postal code		
<p>Account Balance: 0</p> <p>Accrued Interest: 0 As of: 04/30/2015</p> <p>Accrued Penalty: 0 As of: 04/30/2015</p> <p>Adjusted Gross Income: 37,100.00</p> <p>Taxable Income: 8,500.00</p> <p>Tax per return: 0.00</p> <p>SE taxable income taxpayer: 0.00</p> <p>SE Taxable income spouse: 0.00</p>					
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	1 <input type="checkbox"/> Single	4 <input type="checkbox"/> Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here.																			
	2 <input checked="" type="checkbox"/> Married filing joint return (even if only one had income)																				
Check only one	3 <input type="checkbox"/> Married filing separate return. Enter spouse's SSN above																				
Exemptions	6a <input checked="" type="checkbox"/> Yourself. If someone can claim you as a dependent, do not check box 6a.																				
	b <input checked="" type="checkbox"/> Spouse																				
	c Dependents:																				
	<table border="1"> <thead> <tr> <th>(1) First name</th> <th>Last Name</th> <th>(2) Dependent's social security number</th> <th>(3) Dependent's relationship to you</th> <th>If child, does not qualify for child tax credit (see instructions)</th> </tr> </thead> <tbody> <tr> <td>John</td> <td>Portland</td> <td>XXX-XX-3234</td> <td>SON</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Susan</td> <td>Portland</td> <td>XXX-XX-4234</td> <td>DAUGHTER</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	(1) First name	Last Name	(2) Dependent's social security number	(3) Dependent's relationship to you	If child, does not qualify for child tax credit (see instructions)	John	Portland	XXX-XX-3234	SON	<input checked="" type="checkbox"/>	Susan	Portland	XXX-XX-4234	DAUGHTER	<input checked="" type="checkbox"/>					
(1) First name	Last Name	(2) Dependent's social security number	(3) Dependent's relationship to you	If child, does not qualify for child tax credit (see instructions)																	
John	Portland	XXX-XX-3234	SON	<input checked="" type="checkbox"/>																	
Susan	Portland	XXX-XX-4234	DAUGHTER	<input checked="" type="checkbox"/>																	
d Total number of exemptions claimed	4																				
Income	7 Wages, salaries, tips, etc. Attach Form(s) W-2	7	37,000	37,000	37,000																
	8a Taxable interest. Attach Schedule B if required.	8a	50	50	50																
	b Tax-exempt interest. Do not include on line 8a	8b	100																		
	9a 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																			
	15a IRA distributions	15a	0																		
	b Taxable amount	15b																			
	16a 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																			
	20a 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.	22	37,250	37,250	37,250																

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

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 <input checked="" type="checkbox"/>		61			
62 Taxes from <input type="checkbox"/> Form 8959 <input type="checkbox"/> b <input type="checkbox"/> 8960 <input type="checkbox"/> c <input type="checkbox"/> 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
	65 2015 estimated tax payments & amount applied from 2014 return	65			
	66 a Earned income credit (EIC)	66a	2,674		1,600
	b Nontaxable combat pay election <input type="checkbox"/> 66b				
	67 Additional child tax credit. Attach form 8812	67	1,562		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
	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 Forms <input type="checkbox"/> 2439 <input type="checkbox"/> b <input type="checkbox"/> 8885 <input type="checkbox"/> d	73				
74 Add lines 64, 65, 66a, and 67 through 73. These are your total payments		74			1,914
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 <input type="checkbox"/>	76a			
	b Routing number 123000220 c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings				
	d Account number XXXXXXXXXX0012				
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)? <input type="checkbox"/> Yes. Complete below <input checked="" type="checkbox"/> No				
Sign Here	<div> <div> <p>Print/Save the Transcript Get a copy of the Transcript information in a convenient, print-friendly form.</p> </div> <div> <p>Download the Transcript Save Transcript as a data file.</p> </div> </div>				
Paid Preparer's Use Only	Preparer's name _____ Phone no. _____ Preparer's occupation _____ Preparer's spouse's occupation _____ Preparer's Customer Service Rep _____ enter it _____ Date _____ check <input type="checkbox"/> if PTIN _____ self-employed S63053325 Firm's EIN _____ Phone no. _____				

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.