

Getting started

Go to the website:

<https://www.irs.gov/individuals/get-transcript>

Click "Get Transcript Online":



Log In

- Sign up (“Create Account”)

OR

- Log In skip to slide 28



Sign Up

Don't have an account? Create one now.

[CREATE ACCOUNT >](#)

Log In

Already have a username? Welcome back!

Username

[LOG IN >](#)

[Forgot Username](#)

PTIN and FIRE users need a separate account in this system

Log In

- Sign up (“ID.me Create An Account”)
OR

- Log In with either ID.me or the IRS website username and password skip to slide 17
(NOTE: The IRS username will be phased out in 2022)



Sign In or Create a New Account

If you have an existing IRS username, please create a new ID.me account as soon as possible. We're bringing you an improved sign-in experience. You won't be able to log in with your existing IRS username and password starting in summer 2022.

If you're a new user, please create an account with ID.me.

ID.me is our trusted technology partner in helping to keep your personal information safe.

Create a new account

ID.me Create an account

OR

Sign in with an existing account

Sign in with **ID.me**

Sign in with an existing IRS username

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Sign up steps

Create your ID.me account by either:

- Inputting your Email and Creating a password

OR

- Use Facebook/Google/LinkedIn to create your ID.me



Enter your email

Enter your password

Confirm Password

Confirm your password

I accept the ID.me [Terms of Service](#) and [Privacy Policy](#).

[Create an ID.me account](#)

Or sign in with

[Facebook](#) [Google](#) [LinkedIn](#)

[View more options >](#)

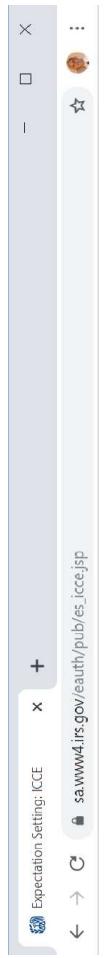
Create an ID.me account

Already have an ID.me account?
[Sign in to your account](#)

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Sign up steps

Get the requested information and hit "yes"



You will need some information about yourself to register

Please have the following information and materials to complete registration:

- Full Name
- Email
- Birthdate
- Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
- Tax filing status
- Current address

Do you have this information available?

NO

YES >

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Sign up steps

Get the requested documentation and hit “yes”



You need a financial account to register

To verify your identity, we will need a number from ONE of your financial accounts. We can use any of the following:

- Credit Card **OR**
- Student Loan **OR**
- Mortgage or Home Equity Loan **OR**
- Home Equity Line of Credit **OR**
- Auto Loan

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.**
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.

Do you have this financial information available? (If you don't have the account information on hand, you should answer 'No'.)

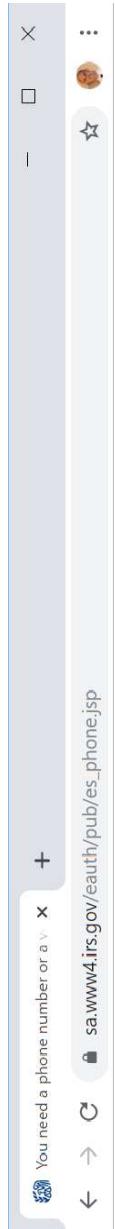
NO

YES >

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Sign up steps

Click continue



You need a phone number or a verified address

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.

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.

[CONTINUE >](#)

[Exit Registration](#)

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

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Sign up steps

Input your First Name & Last Name (as they appear on your last filed tax return)



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.

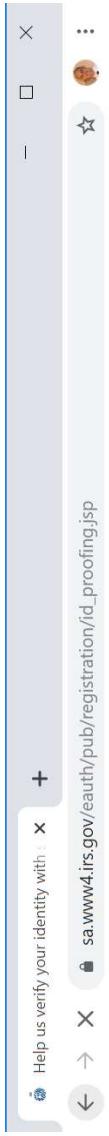
CANCEL

SEND CODE >

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Sign up steps

Check your email and input your verification code then hit continue:



Check Your Email

We just sent a confirmation code to [REDACTED] 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 >](#)

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Sign up steps

Input your DOB, SSN and filing status (Name should flow through from before)

The screenshot shows a web browser window with the URL www4.irs.gov/eauth/pub/registration/id_proofing.jsp. The page title is "Help us verify your identity with...". The IRS logo is at the top left. The main heading is "Help us verify your identity with some basic information". A sub-instruction says "All information should match your latest tax return." Below this, there are fields for "FirstName" and "LastName", both with edit links. There is a "Date of Birth" field with dropdowns for Month, Day, and Year. To the right, there is a "Social Security Number (SSN) or Individual Tax ID Number (ITIN)" field consisting of three input boxes separated by dashes. Below this is a "Filing Status" section with a dropdown menu. At the bottom, there are two radio buttons: one for "I have filed a tax return in the past seven years" and another for "I have not filed a tax return in the past seven years". A checkbox labeled "Select filing status from your most recently filed tax return" is also present.

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Sign up steps

Input your address (matching your most recent tax return) and continue

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
United States

[CANCEL](#) [CONTINUE >](#)

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Sign up steps

Answer one of the selected questions and hit enter:

Verify your financial account number

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:

Last 8 digits of credit card
(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

Home equity line of credit account number

I don't have a current credit card, student loan, auto loan, home equity loan, or mortgage

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.

CONTINUE >

Sign up steps

Enter your phone number and hit "Send Message"

The screenshot shows a mobile browser window on an IRS website. At the top, there's a header bar with icons for back, forward, search, and a menu. Below it, the URL is www.irs.gov/earth/pub/registration/fd_phone.jsp?actionName=VerifyFnDataProxy. The main content area has a light gray background with a thin blue border. It features a large, bold, black font header "Verify your phone number". Below this, there's a sub-header in smaller black font: "We need to verify that your personal information matches the subscriber information for your US-based mobile phone account. By continuing, you authorize our 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." To the right of this text, there's a note: "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." Below the text, there's a text input field labeled "Enter your mobile phone number:" followed by a small placeholder box. To the right of the input field are two buttons: "CANCEL" and "SEND MESSAGE >". At the very bottom of the page, there's a footer with links: "Help | IRS Privacy Policy | Security Code Terms and Conditions | Accessibility".

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Sign up steps

Check your phone and input the code and hit "Continue"

We sent an activation code text! X +

← → C 🔒 sa.www4.irs.gov/eauth/pub/login_actcode.jsp?

The message contains a 6-digit activation code. Please enter the code below.

6-digit activation code Try again

CANCEL CONTINUE >

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Sign up steps

Create a Username, Password, Security Phrase and Site Image then hit “Continue”

The screenshot shows a web page titled "Create a Username and Password". It includes fields for "Username", "Password", and "Re-enter Password". Below these fields is a "Security Phrase" input field with placeholder text: "Create a phrase that you will remember when you log in." To the right of the input field is a "Choose a Site Image" section featuring a thumbnail of a modern building at night. At the bottom of the page are "Cancel" and "Continue >" buttons.

Sign up steps

Hit Continue



Success!

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

CONTINUE >

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Log in (ID.me Credentials)

Input your ID.me credentials Hit Continue
OR
Use Facebook/Google/LinkedIn



ID.me + IRS

CONTINUING TO THE INTERNAL REVENUE SERVICE

To protect your identity and information from fraudulent actors, your authentication and transaction-related data (the information related to your ID.me account and identity verification) will be shared with the IRS. This helps ensure that it is really you interacting with the website and not someone pretending to be you.

This information includes transaction-related data like the following:

- Prior sign-ins using your ID.me account (but the names of the websites you access would not be disclosed)
- Multi-factor authentication methods (e.g., text message or push notification)
- The status of your verification at (e.g., what steps you have or have not completed; partially entered information)
- ID.me does not sell, lease, or trade data to any third parties or derive any profit from the sale, lease, or trade of data.

Continue

Sign in to ID.me

New to ID.me?

Create an ID.me account

Email

Enter your email

Password

Enter your password

Sign in to ID.me

Forgot password

Or sign in with



Facebook



Google



LinkedIn

View more options >

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Log in (ID.me Credentials)

Select a code method



COMPLETE YOUR SIGN IN

1 **2** 3

Receive a code by phone

Text me Call me

You will receive a code at the following number

Continue

Having trouble? Use your [recovery code](#) instead.

If you've changed phone numbers or carriers from when you previously set up multi-factor authentication, please update your [settings here](#).

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Log in (ID.me Credentials)

Input the received code



COMPLETE YOUR SIGN IN

1 2 3

Enter the code we sent to [REDACTED]

Enter the 6-digit code.*

Didn't receive the code? [Send it again](#)

Having trouble? Use your [recovery code](#) instead.

If you've changed phone numbers or carriers from when you previously set up multi-factor authentication, please [update your settings here](#).

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Log in (ID.me Credentials)

If asked - "Take a Selfie" steps

Hit Continue

Hit Start

Choose an option

- Phone
or

- WebCam

VERIFY YOUR IDENTITY

VERIFY YOUR IDENTITY
VERIFY YOUR IDENTITY

You're almost there! There is one additional step required to complete verifying your identity.

You will need the following to proceed:



Take a Selfie

Take a Selfie

Continue

Why am I seeing this?

VERIFY YOUR IDENTITY

Let's take a video selfie



Take a selfie with my phone

OR

Take a selfie with my webcam

YOUR WEBCAM MUST BE ABLE TO OPEN ON THE DEVICE YOU ARE ON RIGHT NOW

Start

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Log in (ID.me Credentials)

Selfie on your Cell Phone

Received the Text Message

Once you follow those steps
the window will disappear

WAITING FOR YOUR PHOTOS...

Text sent to [REDACTED]



Please tap the link to upload photos.

Didn't receive the text message?

[Send it again](#)

VERIFY YOUR IDENTITY

Take a video selfie with my device

Enter a mobile phone number, and we'll text you a link to take a video selfie.

Personal Phone Number

YOUR MOBILE PHONE MUST HAVE A CAMERA AND A WEB BROWSER.

[Continue](#)

Log in (ID.me Credentials)

Once you have taken your selfies, the "Verify your Identity" will disappear.

**If this is your first time logging in with ID.me you will have to link to your IRS account by hitting "allow"

ID.me + IRS

AUTHORIZE THE INTERNAL REVENUE SERVICE

Before we send you back to the Internal Revenue Service, we need your permission to share your verified identity information.

Please note that only information obtained from the verification process will be shared.

The Internal Revenue Service will receive:

<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Middle Name
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> Full SSN	<input checked="" type="checkbox"/> Birth Date
<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> Street
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> State
<input checked="" type="checkbox"/> Postal Code	<input checked="" type="checkbox"/> Group Association

[Allow](#) [Deny](#)

You can remove this access at any time by changing your ID.me account settings.

VERIFY YOUR IDENTITY

Your ID is being checked for authenticity.
This can take up to 15 seconds.

Waiting for processing to complete ...

Go to slide 28

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Log in (IRS Credentials)

Input Username



A screenshot of a web browser window. The address bar shows the URL: `sa.www4.irs.gov/eauth/pub/login.jsp?Data=VGFnTGFyZ2V0TG9BPUY%253D&TYPE=33554433&REALMOID=06-000e9548...;`. The browser interface includes standard controls like back, forward, and search.



Sign Up

Don't have an account? Create one now.

[CREATE ACCOUNT >](#)

Log In

Already have a username? Welcome back!

Username

LOG IN >

[Forgot Username](#)

PTIN and FJRE users need a separate account in this system

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Log in

Review the Site Image & Site Phrase. If correct, input your password.



Log In

Verify that your Site Image and Site Phrase below are correct. If the Site Image and Site Phrase are not correct, please do not proceed.

Your Site Image:

Your Site Phrase:

Forgot Password

CANCEL

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Log in

Check your (previously registered cell phone), input the code and hit
“Continue”



We sent a security code to your phone

We sent a text message to your phone (ending in 8736). Please enter the code below.

6-digit security code

[Resend Security Code](#)

[No longer have access to this phone?](#)

[CONTINUE >](#)

If you can't get a text message right now, you can get a security code via phone call.

[Logout](#)

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Log in

Review the information and hit "Continue"



Online Security Information

Your Login History

For your security, we will show you your most recent login history every time you log in. Report suspicious activity.

Date	Time	Activity
Nov 21, 2019	13:38	Login

Security Announcement

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

[CONTINUE >](#)

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Log in

Select the reason "Mortgage Related", no "Customer File Number" needed and hit Go

Get Transcript

The screenshot shows a web page with a light gray background. At the top, there is a blue header bar with the text "Log in". Below the header, the main content area has a white background. On the left side, there is a large, faint watermark-like graphic of a house. In the center, there is a form with the following fields:

- A dropdown menu labeled "Select a reason you need a transcript:" with the option "Mortgage Related" selected.
- An input field labeled "Customer File Number:" containing a placeholder "XXXXXX".
- A blue "Go" button with a right-pointing arrow icon.

To the right of the form, there is a sidebar with a gray header and a white content area. The header contains the text "Customer File Number Help". The content area contains the following text:

The 10-digit Customer File Number serves as an alternative tracking number to match the transcript to the taxpayer for third-parties such as tax practitioners, lenders and college financial aid offices.

Leave the entry blank if you were not directed by a third-party to enter the number. Do not use your Social Security number.

Using your keyboard, you can manually **enter** a Customer File Number assigned to you, for example, by a lender or college financial office. That customer file number will display on the transcript when it is downloaded.