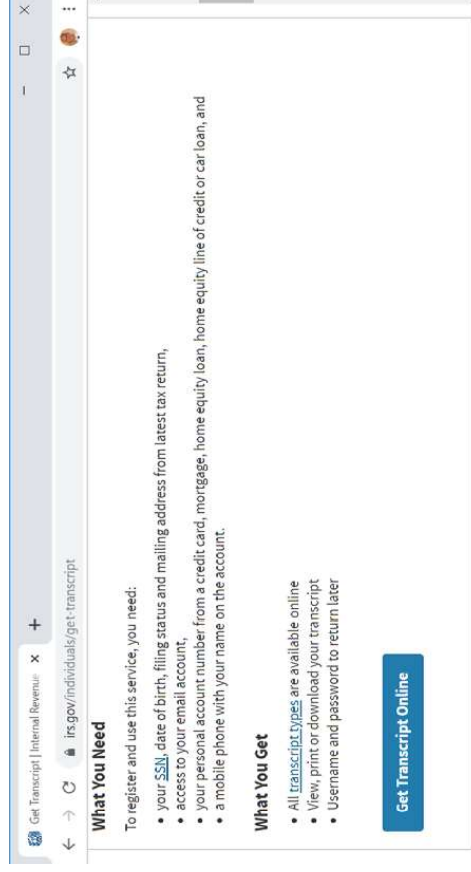


# Getting started

Go to the website:

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

Click “Get Transcript Online”:



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# 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*

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# 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



**Create an ID.me account**

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

**Email**  
Enter your email


**Password**  
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 >](#)

# 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?

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# Sign up steps

Get the requested documentation and hit “yes”

Expectation Setting: Financial

← → ↻ 🔒 sa.www4.irs.gov/eauth/pub/es\_avs.jsp

✕ + ☆ 🍪



### 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'.)

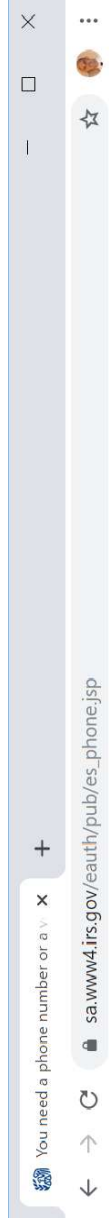
NO

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:

Help us verify your identity with 

    sa.www4.irs.gov/eauth/pub/registration/rd\_proofing.jsp  



### Check Your Email

We just sent a confirmation code to . 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.](#)

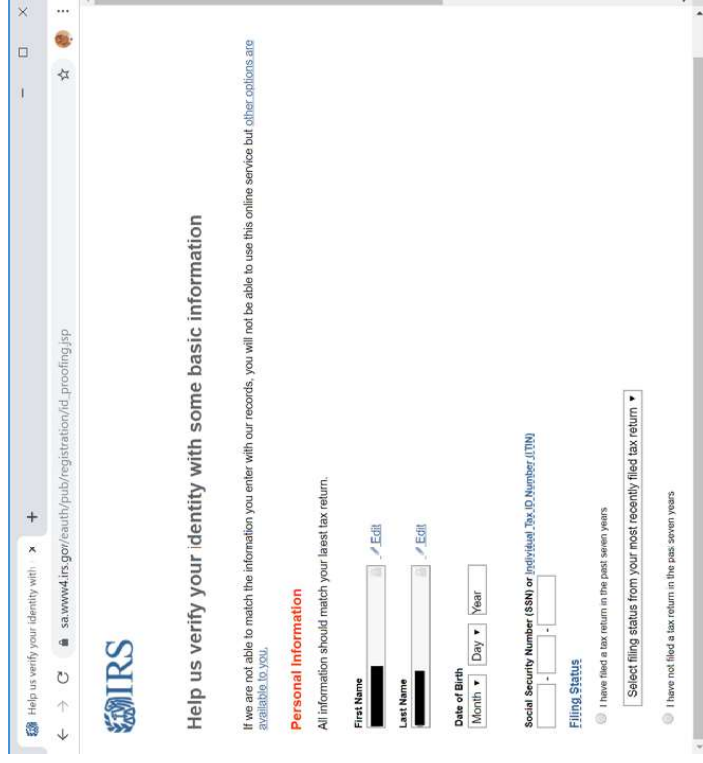
CANCEL

CONTINUE >

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

# 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 [sa.www4.irs.gov/ea/ty/pub/registration/id\\_proofing.jsp](https://sa.www4.irs.gov/ea/ty/pub/registration/id_proofing.jsp). The page features the IRS logo and the heading "Help us verify your identity with some basic information". A message states: "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." The form is titled "Personal Information" and includes the instruction "All information should match your latest tax return." The fields are as follows:

- First Name:** [Redacted]
- Last Name:** [Redacted]
- Date of Birth:** Month , Day , Year
- Social Security Number (SSN) or Individual Tax ID Number (ITIN):** [Redacted] - [Redacted]
- Filing Status:**

At the bottom, there are two radio button options:

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

# 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

CANCEL

CONTINUE >

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

# Sign up steps

Answer one of the selected questions and hit enter:

The screenshot shows a web browser window with the URL [sa.www4.irs.gov/eaufthy/pub/registration/fide\\_proofing.jsp](https://sa.www4.irs.gov/eaufthy/pub/registration/fide_proofing.jsp). The page title is "Verify your financial account number". Below the title, a message states: "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 seven radio button options, each followed by a text input field:

- ☐ 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

Below the options, a message reads: "By providing financial account information, I authorize the IRS to access my credit report for the purpose of verifying my identity." At the bottom right is a blue button labeled "CONTINUE >".

On the right side of the page, there is a grey box titled "Financial account information" containing the following text:

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 is verifying 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.

At the bottom of the page, there are links for "Help", "IRS Privacy Policy", "Security Code Terms and Conditions", and "Accessibility".

# Sign up steps

Enter your phone number and hit "Send Message"

Verify your phone number

sa.www4.irs.gov/eauth/pub/registration/vd\_phone.jsp?sectionName=VerifyFinDataProxy

**IRS**

### Verify your phone number

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.

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.

Enter your mobile phone number:

[CANCEL](#) [SEND MESSAGE >](#)

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.

**Don't have a mobile phone or can't verify your phone number? Try these alternative options.**

Receive an activation code by postal mail (5-10 business days). Selecting this option will allow you to create your username and password, but you won't be able to access the online service today. You'll need to come back to activate your account after you receive the activation code in the mail.

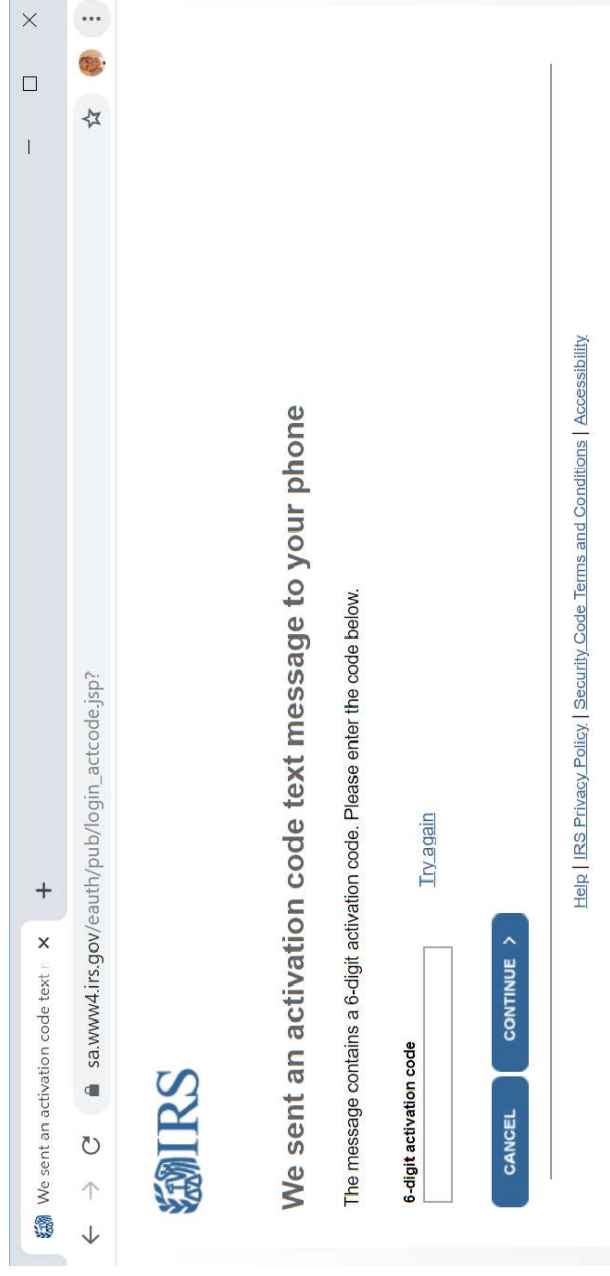
Review alternatives to using this online service. These options will not allow you to complete registration for this online service.

[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”



The screenshot shows a web browser window with the URL `sa.www4.irs.gov/eauth/pub/login_actcode.jsp?`. The page features the IRS logo at the top left. The main heading is "We sent an activation code text message to your phone". Below this, a message states: "The message contains a 6-digit activation code. Please enter the code below." There is a text input field labeled "6-digit activation code" with a "Try again" link to its right. At the bottom of the form are two buttons: "CANCEL" and "CONTINUE >". A footer at the very bottom contains links for "Help", "IRS Privacy Policy", "Security Code Terms and Conditions", and "Accessibility".

# Sign up steps

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

The screenshot shows a web browser window with the URL <https://lennar.mortgage/verify/create>. The page is titled "Create a Username and Password" and contains several input fields and instructions.

**Create a Username and Password**

Enter a username of your choice. The username should be 4-16 characters and contain only letters, numbers, and hyphens. No spaces or special characters (e.g., @, #, %).

**Choose a Password**

Choose a password that is 8-16 characters long. It must contain at least one uppercase letter, one lowercase letter, one number, and one special character (e.g., !, @, #, \$, %, ^, &).

**Choose a Site Phrase**

Choose a phrase that you will recognize when you login.

**Choose a Site Image**

Upload an image that you will recognize when you login.

Buttons: **Cancel**, **Continue**

Footer: [Help](#) | [Site Features](#) | [Privacy Policy](#) | [Terms and Conditions](#) | [Accessibility](#)

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# Sign up steps

Hit Continue



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# Log in (ID.me Credentials)

Input your ID.me credentials Hit Continue

OR

Use Facebook/Google/LinkedIn



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 >

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)

If you choose not to continue, you will not be able to use your ID.me account to access IRS.

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

# 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

[Redacted phone 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](#)

[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)

If asked - "Take a Selfie" steps

Hit Continue

Hit Start

Chose an option


- Phone
- or
- WebCam

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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

Continue

Why am I seeing this?

VERIFY YOUR IDENTITY



ID.me is verifying your identity for access to The Internal Revenue Service.

**DO NOT PROCEED IF**

- You did not login or create an account with ID.me
- Someone is misguiding you to follow these steps
- You are receiving help you didn't ask for

If you suspect fraud, please contact [fraud@id.me](mailto:fraud@id.me)

**Follow the steps below**


- 1) Grant permission to use your webcam
- 2) Click "scan my face" to begin video selfie
- 3) Success! Detection will commence with a series of colorful flashing lights.
- 4) Your results will be displayed

**Note:** This technology is compliant with WC accessibility standards for users with photosensitive considerations (photosensitive epilepsy).

Start

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

# Log in (ID.me Credentials)

Selfie on your Cell Phone


Received the Text Message

Once you follow those steps  
the window will disappear

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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

 [REDACTED]

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

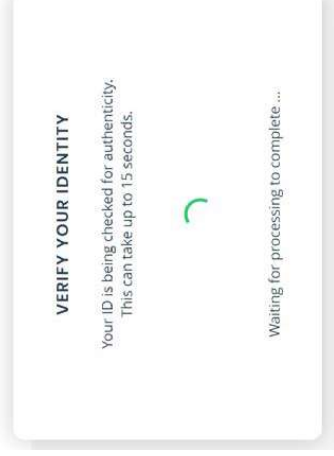
Continue

# 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”

[Go to slide 28](#)



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# Log in (IRS Credentials)

Input Username



## 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*

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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:



Password

[Forgot Password](#)

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CANCEL

SUBMIT >



# 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 login. [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 >

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

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# Log in

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

## Get Transcript

Select a reason you need a transcript:

Mortgage Related

Customer File Number:

GO

### Customer File Number Help

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.