# *my* IRS Account

# I have a dream

- Taxpayer Identity is secure, authorized and authenticated – only taxpayers can sign and submit their return.
- Tax responsibilities will be easier to manage.
    - Less manual entry, less time for tax prep, fewer physical documents to lose, fewer errors to fix on the back end for Taxpayers and the IRS
- Taxpayers will be better informed of tax benefits and liabilities for financial decisions.
- Providing tax information to others will be secure, encrypted and simple.
- There will be new integration of tax data across source systems for further automation and protect identity.
- Simple returns will be available on-line or in the mail, ready for review, approval, signing and filing.

# Vision: A Taxpayer Portal

- A single secure Taxpayer Portal where taxpayers can:
  - Maintain their personal information such as dependents, Power of Attorney, Tax Preparer, bank accounts and health insurance
  - Access their Tax Information from prior years and share it with 3rd parties
  - Discover tax benefits
  - Find all current tax documents, prepare, sign and file their return online or with help from others
  - Access their Tax Account and make payments

# Incremental Steps leading to big improvements

Deliver small "chunks" of functionality over time that will provide a highly secured taxpayer portal that leads to significant efficiency while improving compliance *and* tax benefits for the majority of taxpayers.

***my* IRS Account – ** The entryway into new taxpayer functionality

***my* Profile**

- **Personal Information** – Maintain personal information such as POA, Tax Preparer, Bank accounts
- **Relationships and Dependents** – Identify dependents and the data needed for tax benefits

***my* Tax Information** – Access tax transcripts and share information with 3rd parties

***my* Tax Account** – View Tax Account, see balances due, interest, and payments

***my* Tax Return** – See status of Tax Documents, view details, prepare return and file it

***my* Tax Benefits** – View current tax benefits and find new ones available


IRS
Accessibility
Contact Us
FAQs
Español
Other Languages
Sign In
Search...
My Home
Help Center
Security Settings
my Tax Benefits
my Profile
my Tax Information
my IRS Account
my Tax Account
my Tax Return
my Tax Return
my Tax Account
my Tax Benefits

IRS
Accessibility
Contact Us
FAQs
Español
Other Languages
Security Settings
Discover tax benefits
Maintain taxpayer personal information
Access and share Tax Information
my Tax Benefits
my Profile
my Tax Information
A single secure Taxpayer Portal
my IRS Account
my Tax Return
my Tax Account
Prepare a return
Access Tax Account and make payments
my Tax Return
my Tax Benefits

# *my* Profile

**Phase I a – Personal Information**

- Build application for use of new authorization and Identification system that will be the robust and secure foundation for future applications.
- Identify new data requirements for taxpayer identification for matching to returns.
- Leverage source system data for verification and identification. Examples might be:
  - Social Security data would be the source for Name, Social Security Number, Marriage, Divorce, Death.
  - State ID/Drivers License Data could be used for Identity matching, partnering with states.
  - Passport data from the US Department of State could be leveraged for identity matching.
- Add functionality for linking Financial accounts and Health Insurance data.
- New data would be stored for future needs for automated return creation

# *my* Profile (Cont’d)

**Phase I b –Relationships and Dependents**

- Build new application so Taxpayer can manage relationships and dependency.
- Application would add functionality to determine eligible tax benefits and dependency leveraging tools similar to those in the Interactive Tax Assistance tool.
- Ability to Add, Change and Remove relationships/dependency through multiple channels to support diverse needs (web, email, mail, phone).
- Ability to “request” transfer of dependents from existing taxpayer who will have ability to ”approve” or “deny” transfer.
- Head off identity theft, dependency conflicts and injured spouse delays by recognizing conflicts and providing an opportunity for dispute resolution ***before*** filing.
  - The first return filed will no longer be able to “steal” a person. Existing relationships in new system will rule.
  - Every transfer of dependency must be approved by the person who had the dependent in the prior year. Call centers will have secured capability to help taxpayers with transfers and disputes.
  - Disputes would put a hold on the dependent until resolved.

# *my* Tax Information

**Phase II a - Taxpayer will be able to view, download and share their transcripts**

- Leverage e-Services capabilities and add functionality to give taxpayer the ability to authorize e-Services for Third Parties such as Tax Preparers, Mortgage Brokers, and Credit Card Providers who are registered with the IRS with a designation of something like the current Approved Business Partner.
  - Possible revenue opportunity for the IRS and efficiency for the partners.
- All users of transcript data will be registered and identified for this access and all access will be tracked.
- Reports will be improved, but only to the extent possible with the existing data. Format will represent a 1040 and source schedules and forms.

# *my* Tax Information (Cont'd)

**Phase II b - Taxpayer information availability will be complete**

- The ultimate goal for the Return Transcript will be a report in the form of a 1040 return, with taxpayer amendments and IRS changes clearly identified.
- All source document data will be captured and retained to provide the foundation for further capabilities.
  - Access to source tax documents for the current tax year would reduce the need for paper W-2's, 1099's etc., and could eliminate manual entry of tax data.
    - Lost tax documents are a major issue for many taxpayers, particularly seniors.
  - Complex tax laws make tax compliance difficult for the majority of taxpayers. Additional data would enable fully automated tax preparation for many taxpayers. For example, state taxes paid are not captured today but are needed for itemization.
  - Partnerships with organizations such at Tax Prep Software Firms, Payroll and Benefits firms, not-for-profits (insurance providers, AARP) could help finance capabilities.

# *my* Tax Account

**Phase III – Clear online tracking of taxpayer liabilities and payments**

- New functionality will make it easier for the Taxpayer to view any tax liabilities and payments to their tax account.
- Functionality would be similar to on-line banking with liability, penalties, interest, and payments clearly displayed.
  - Taxpayer could clearly see all quarterly and account payments.
- Alternatives for making payments will be available and linked to the Tax Account from Financial accounts identified in the “Personal Information” application.

# *my* Tax Return

**Phase IV a – Reduction of manual entry and reduced risk of ID theft**

- Secured, encrypted ability to download all data to Vendor Tax Programs either by taxpayer, POA, or Authorized Preparer.
- Secured, encrypted ability to transmit return data from Vendor Tax Programs to Taxpayer ***my*** IRS Account.
- New Taxpayer functionality to Review, Sign and e-File current return through multiple channels.
  - Secured on-line accounts for taxpayer ***and*** spouse.
  - Multiple channels available including phone call with IRS call center and security processes for taxpayers with low vision and other disabilities.
  - Secured approval and signing prevents ID theft, prevents illicit firms from rerouting refunds and requires spousal review and submission.

# *my* Tax Return (Cont'd)

**Phase IV b – New tax prep capabilities**

- Delivers a dashboard showing status of tax documents currently available and status of the return.
- Link to complete source documents such as W2, 1099's, 1095a's etc.
  - Could reduce complexity of source documents by standardization of format (for example, today's 1099-B Broker statements are "interesting").
  - Could alert taxpayers to issues with documents that are missing.
- Provides data, tax calculations, credit, deduction and subtraction automation, return completion, approval and filing.

# *my* Tax Benefits

**Phase V – Document current benefits and suggest potential tax benefits**

- Logic capabilities from the Interactive Tax Assistant Tools would leverage new data captured in **Personal Information** and **Relationships and Dependents.**
- Areas where there are actual tax savings on a return would be identified:
  - Deductions
  - Tax Subtractions
  - Tax Credits
  - Favorable treatment of income – Capital Gains, Dividends, Social Security.
- Provide ability to identify new opportunities for tax savings
  - Various Education Credit Scenarios (e.g. Pell Grant for housing, higher dependent income), 401k, IRA, HSA, Health Care, Child Care.

# Sequence of Documents

To meet size constraints, the presentation has been divided into three PDF Documents

My IRS Account – 1

- ***my*** **IRS Account**
- ***my*** **Profile**
  - **Personal Information**
  - **Relationships and Dependents**

My IRS Account – 2

- ***my*** **Tax Information**
- ***my*** **Tax Account**

My IRS Account – 3

- ***my*** **Tax Return**
- ***my*** **Tax Benefits**

# *Credits & Approach:*

- Special thanks to WWW.IRS.Gov and WWW.SocialSecurity.gov
  - Capabilities and style have been heavily “borrowed” from these sites
  - Both organizations have done a lot with very limited resources, particularly in the last few years.
  - IRS resources contacted have been generous with their time.
- Focus for this document was new capabilities predominantly for lower and modest income families and seniors
  - Priorities and design would require significant in depth analysis
  - To provide conceptual examples, new types of data are suggested, but are illustrative, only. An example might be that Drivers Licenses might not be a best practice for ID validation.
  - Due to time constraints, only simple, “happy path” scenarios have been illustrated

Thought bubbles are used for conveying
new ideas, interactions, and
hopefully, adding some clarity!

# *About the entrant*

Kathy Goeddel, PMP, CSM, Tax-Aide Fellow

Kathy Goeddel is a passionate volunteer with the AARP Tax-Aide Program. She is currently the District Coordinator and Technical Coordinator for 11 Tax Sites with 75 volunteers serving inner North, Northeast and Northwest Portland, Oregon. She has been recognized as a Tax-Aide Fellow for her long and distinguished service to the program. No more than 1% of the volunteers are recognized as a Tax-Aide Fellow each year.

In 2010, Kathy retired from a career as a Director and Program Manager in Information Systems. She built and managed new high performance teams for Standard Insurance and Tektronix. She is known for defining and implementing significant process improvements in conjunction with the integration of new technology in the business. She has strong leadership, financial, and strategic management skills. During her tenure with the Internet Business Group at Tektronix, the website was recognized with an eWEEK top 10 ranking of FastTrack 500 Innovators for e-business, and the InternetWeek.com 100 for top commercial web innovators. She has implemented global business applications such as e-Commerce, ERP, Manufacturing, Finance, Automatic Call Distribution and Data Warehouses. She has led teams implementing new strategic technology platforms including content management, portal, messaging, and technology that integrates legacy applications. Prior to this, she held positions in Information Systems and Finance at Procter & Gamble. She has also been an instructor at Portland State University and Oregon State University in Information Systems at both undergraduate and graduate levels. Her education includes a BA in Economics and an MBA in Management Information Systems from Indiana University.

# *my* Profile

# Scenarios for *my* Profile

- Married taxpayer, Katherine, views her **Personal Information**
  - Taxpayer will be able to see her data. Contact information can be updated
  - They can enter and maintain their Financial Accounts.
- Taxpayer updates relationships and dependents.
  - Katherine will update her filing status.
  - She will :
    - Confirm and update an existing dependent son, John.
    - Remove a sister, Susan, who is no longer a dependent.
    - Add a brother-in-law, Thomas.
    - Review tax benefits available for dependents.

**my IRS Account** Welcome, Katherine! You last signed in on May 02, 2015 at 10:28AMEDT.

My Home | Help Center | Security Settings

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

Personal Information | My Relationships & Dependents | Insurance Information

Your Name:
**Katherine A. Portland**
Social Security Number:
**XXX-XX-1234**
Date of Birth:
**January 01, 1975**

My Spouse:
**Don A. Portland**
Social Security Number:
**XXX-XX-2234**
Date of Birth:
**January 01, 1972**

Taxpayer and Spouse data will be sourced and updated from Soc. Security Records. New ID Verification will be needed. Matching to source systems such as State DMV or Immigration and Naturalization Passport data may be added.

**Your Address, Phone Number and E-mail**

Address:
**1300 N Hall Street**
**Portland, OR 97212**
Daytime Phone: **(503) 555-1212**
Home Phone: **(971) 555-1212**
Cell: **(971) 555-1234**
Email: kathy.portland@gmail.com
Biometric data: **TBD**

Update Contact Information

**IP PIN**

XXXXXX

Update IP PIN

**Government ID's**

Driver's license / state ID num
Issue date of license or state ID: **11/15/20**
Expiration date of license or state ID: **01/01/202**
State where license or state ID was issued: **OR**

Passport Number: **411111117**
Date of Issue: **15 Apr 2009**
Date of Expiration: **14 Apr 2019**

Update Government ID's

**Additional Information**

Occupation: **Instructor**
Blind: **No**
Totally and Permanently Disabled: **No**
Injured Spouse: **No**

Other New Data: TBD....
Do you want $3 to go to the Presidential Election Campaign: **Yes**

Update Information

as
a blind or visually impaired user?

Go to Security Settings

Your security settings allows you to view or update your:

- security options,
- password, and
- password reset questions.

| Financial Account Information | | Account Type |
|---|---|---|
| Our Checking Account<br>US BANK NA<br>Account Number: x0012 (Last 4 Digits) | Katherine A Portland<br>Don A Portland | Checking |
| Portland's Joint Savings<br>US BANK NA<br>Account Number: x0024 (Last 4 Digits) | Katherine A Portland<br>Don A Portland | Savings |
| Katherine's Regular IRA<br>Bank of America<br>Account Number: x0015 (Last 4 Digits) | Katherine A Portland | IRA |
| Katherine's Roth IRA<br>MyRA<br>Account Number: x0015 (Last 4 Digits) | Katherine A Portland | Roth IRA |

Update Financial Accounts

This is a continuation of the Personal Information screen. All financial accounts required for payment or deposit are included. Security and edit requirements should be similar to online financial institution transfer account verification processes for external accounts. Only accounts verified here can be used for refunds, reducing risk refund identity theft.

**IRS** *my* **IRS Account**

My Home | Help Center | Security Settings

My Profile | My Tax Information | My Tax Account | My Tax Return | My Tax Ben

Personal Information | My Relationships & Dependents | Insurance Information

**My Current Filing Status**

My Status: **Married Filing Jointly**
Effective: **12/31/2015**
Date Confirmed: **01/15/2015**
Do You and/or your spouse provide more than half of your own support? **Yes**
Personal Exemptions? **1**

My Spouse: **Don**
Effective: **12/31**
Date Confirmed:
Do You and/or yo
half of your own s
Personal Exemptions:

Update Filing Status and Exemptions

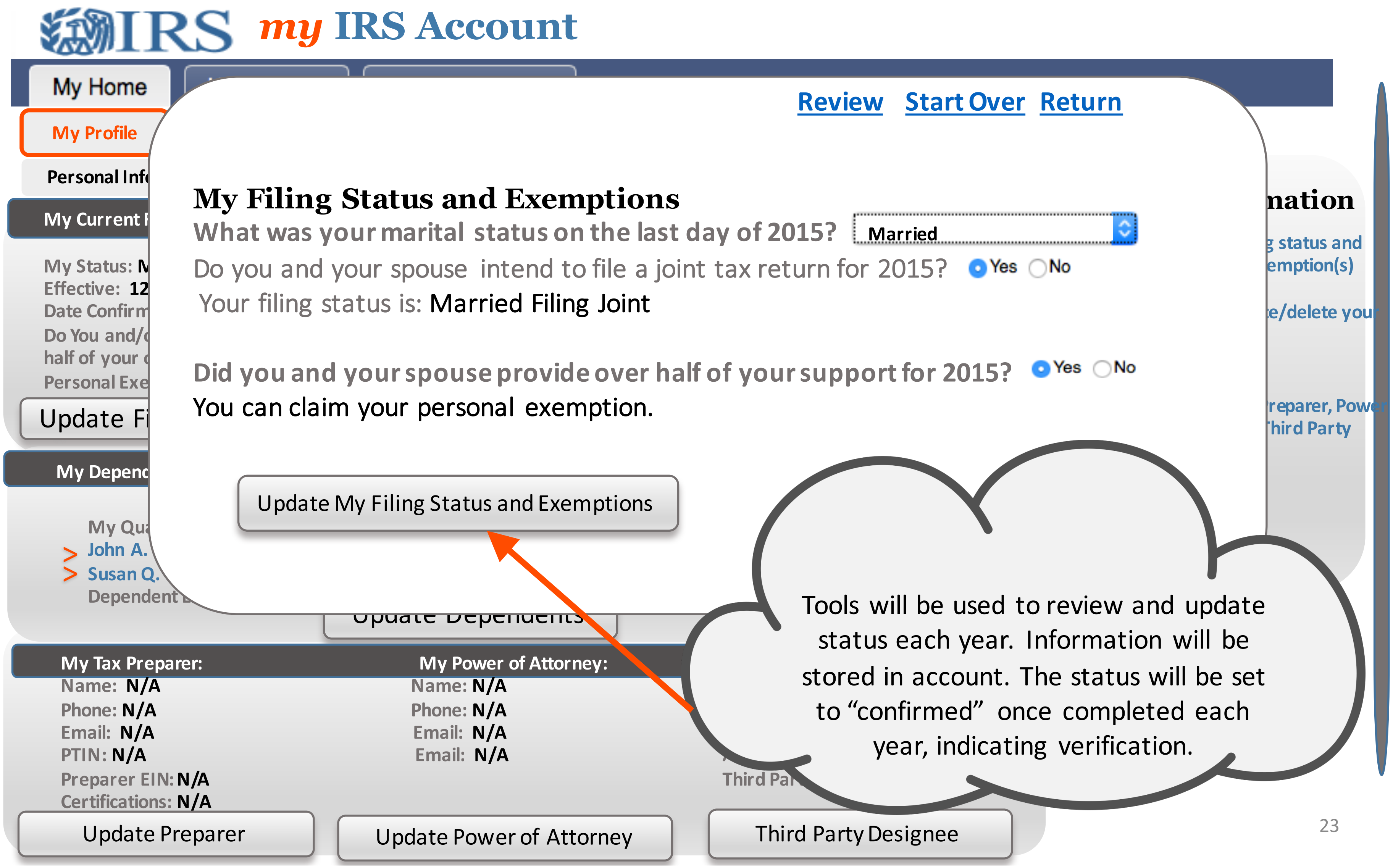
New tool using logic similar to the Interactive Tax Assistant Tools, "What is My Filing Status?" and "Can I claim my personal exemption?", will be used to update Status and Exemptions.

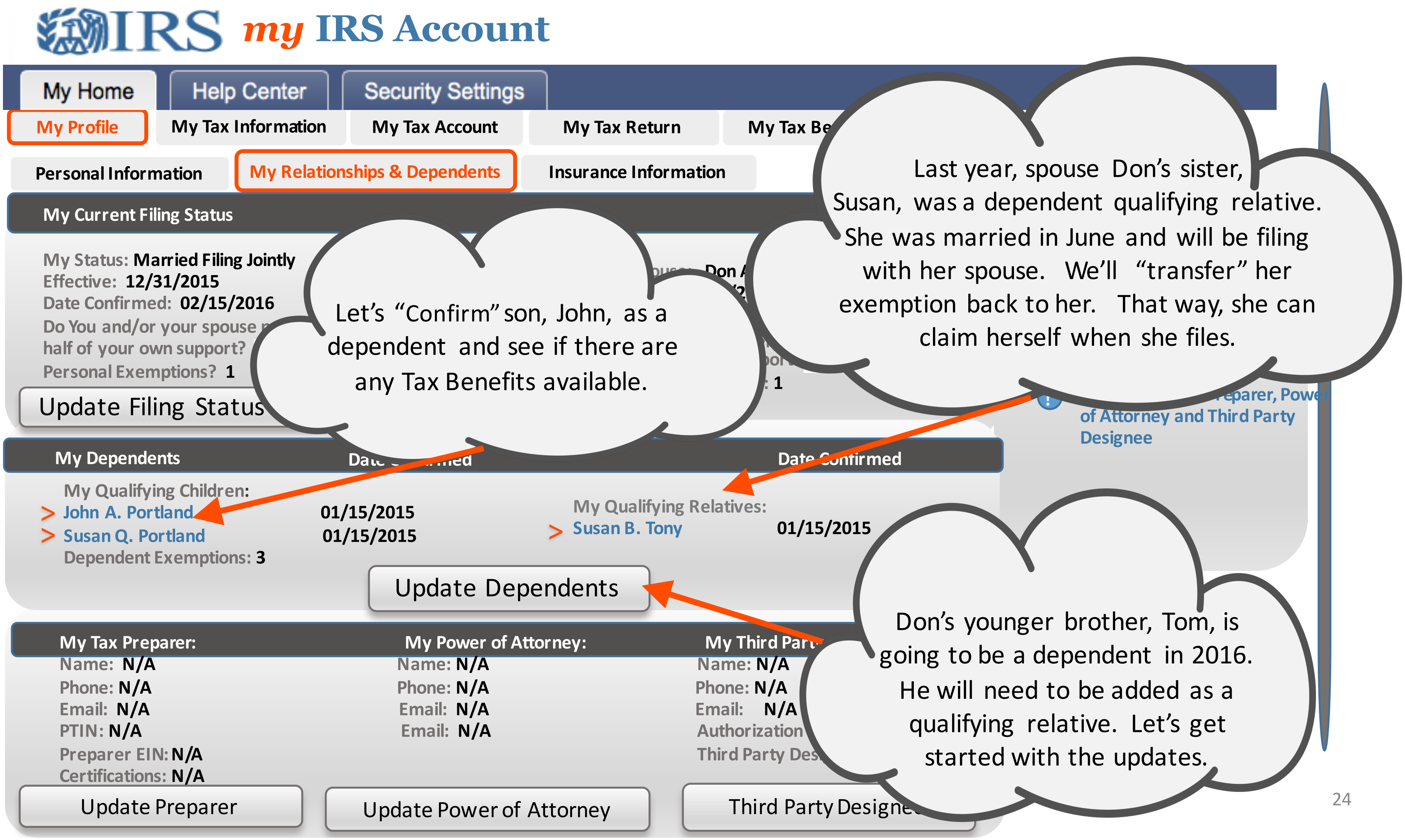
| My Dependents | Date Confirmed | | Date Confirmed |
|---|---|---|---|
| My Qualifying Children: | | My Qualifying Relatives: | |
| > John A. Portland | 01/15/2015 | > Susan B. Tony | 01/15/2015 |
| > Susan Q. Portland | 01/15/2015 | | |
| Dependent Exemptions: **3** | | | |

Update Dependents

| My Tax Preparer: | My Power of Attorney: | My Third Party Designee: |
|---|---|---|
| Name: **N/A** | Name: **N/A** | Name: **N/A** |
| Phone: **N/A** | Phone: **N/A** | Phone: **N/A** |
| Email: **N/A** | Email: **N/A** | Email: **N/A** |
| PTIN: **N/A** | Email: **N/A** | Authorization Indicator: **N/A** |
| Preparer EIN: **N/A** | POA Document: **N/A** | Third Party Designee ID Number: **N/A** |
| Certifications: **N/A** | | |

Update Preparer | Update Power of Attorney | Third Party Designee


IRS my IRS Account
My Home
My Profile
Personal Inf
My Current I
My Status: M
Effective: 12
Date Confirm
Do You and/
half of your
Personal Exe
Update Fi
My Depend
My Qua
John A.
Susan Q.
Dependent
Review Start Over Return
My Filing Status and Exemptions
What was your marital status on the last day of 2015? Married
Do you and your spouse intend to file a joint tax return for 2015? Yes No
Your filing status is: Married Filing Joint
Did you and your spouse provide over half of your support for 2015? Yes No
You can claim your personal exemption.
Update My Filing Status and Exemptions
Update Dependents
mation
g status and
emption(s)
e/delete your
reparer, Power
Third Party
Tools will be used to review and update status each year. Information will be stored in account. The status will be set to "confirmed" once completed each year, indicating verification.
My Tax Preparer:
Name: N/A
Phone: N/A
Email: N/A
PTIN: N/A
Preparer EIN: N/A
Certifications: N/A
My Power of Attorney:
Name: N/A
Phone: N/A
Email: N/A
Email: N/A
Third Pa
Update Preparer
Update Power of Attorney
Third Party Designee


IRS my IRS Account
My Home
Help Center
Security Settings
My Profile
My Tax Information
My Tax Account
My Tax Return
Personal Information
My Relationships & Dependents
Insurance Information
My Current Filing Status
My Status: Married Filing Jointly
Effective: 12/31/2015
Date Confirmed: 02/15/2016
Personal Exemptions? 1
Update Filing Status
Let's "Confirm" son, John, as a dependent and see if there are any Tax Benefits available.
Last year, spouse Don's sister, Susan, was a dependent qualifying relative. She was married in June and will be filing with her spouse. We'll "transfer" her exemption back to her. That way, she can claim herself when she files.
of Attorney and Third Party Designee
My Dependents
Date Confirmed
My Qualifying Children:
> John A. Portland 01/15/2015
> Susan Q. Portland 01/15/2015
Dependent Exemptions: 3
My Qualifying Relatives:
> Susan B. Tony 01/15/2015
Update Dependents
Don's younger brother, Tom, is going to be a dependent in 2016. He will need to be added as a qualifying relative. Let's get started with the updates.
My Tax Preparer:
Name: N/A
Phone: N/A
Email: N/A
PTIN: N/A
Preparer EIN: N/A
Certifications: N/A
My Power of Attorney:
Name: N/A
Phone: N/A
Email: N/A
Email: N/A
Name: N/A
Phone: N/A
Email: N/A
Update Preparer
Update Power of Attorney

IRS *my* IRS Account

My Home | Help Center | Security Settings

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

Personal Information | My Relationships & Dependents | Insurance Information

**My Qualifying Child**

> John A Portland
Date of Birth: **01/01/2006**
Social Security Number: **XXX-X**
Relationship: **Son**

Son, John, is selected. Once all of the Interactive Tax Assistant questions for dependency and benefit eligibility have been answered, the data for dependency and eligibility is updated and the date confirmed is set.

> Susan B Tony
Date of Birth: **01/05/1976**
Social Security Number: **XXX-**
Relationship: **Sister**

Review Start Over Return

# Dependency & Benefit Eligibility Interactive Tax Assistant

Was John married any time in 2015? Yes No

Did John provide more than half of his or her own support? Yes No

Are you filing a joint return with John's other legal parent (as determined by state law? Yes No

Did John live with you for more than half of 2015 (including temporary absences? Yes No

Can another person claim John as a qualifying child? Yes No

**hn is your qualifying child dependent.**

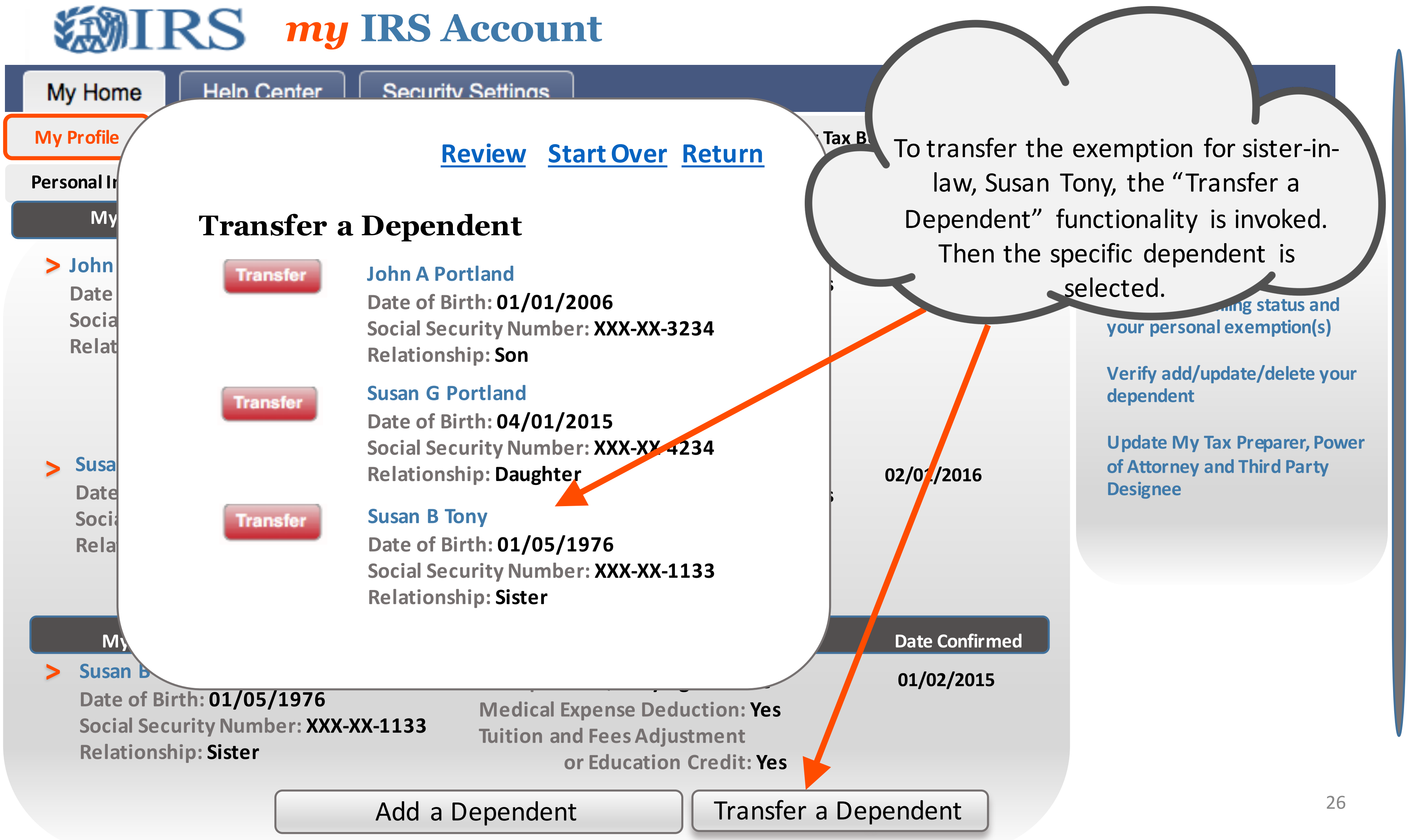
d you pay or incur expenses to care for an individual in order to work or look for work? Yes No

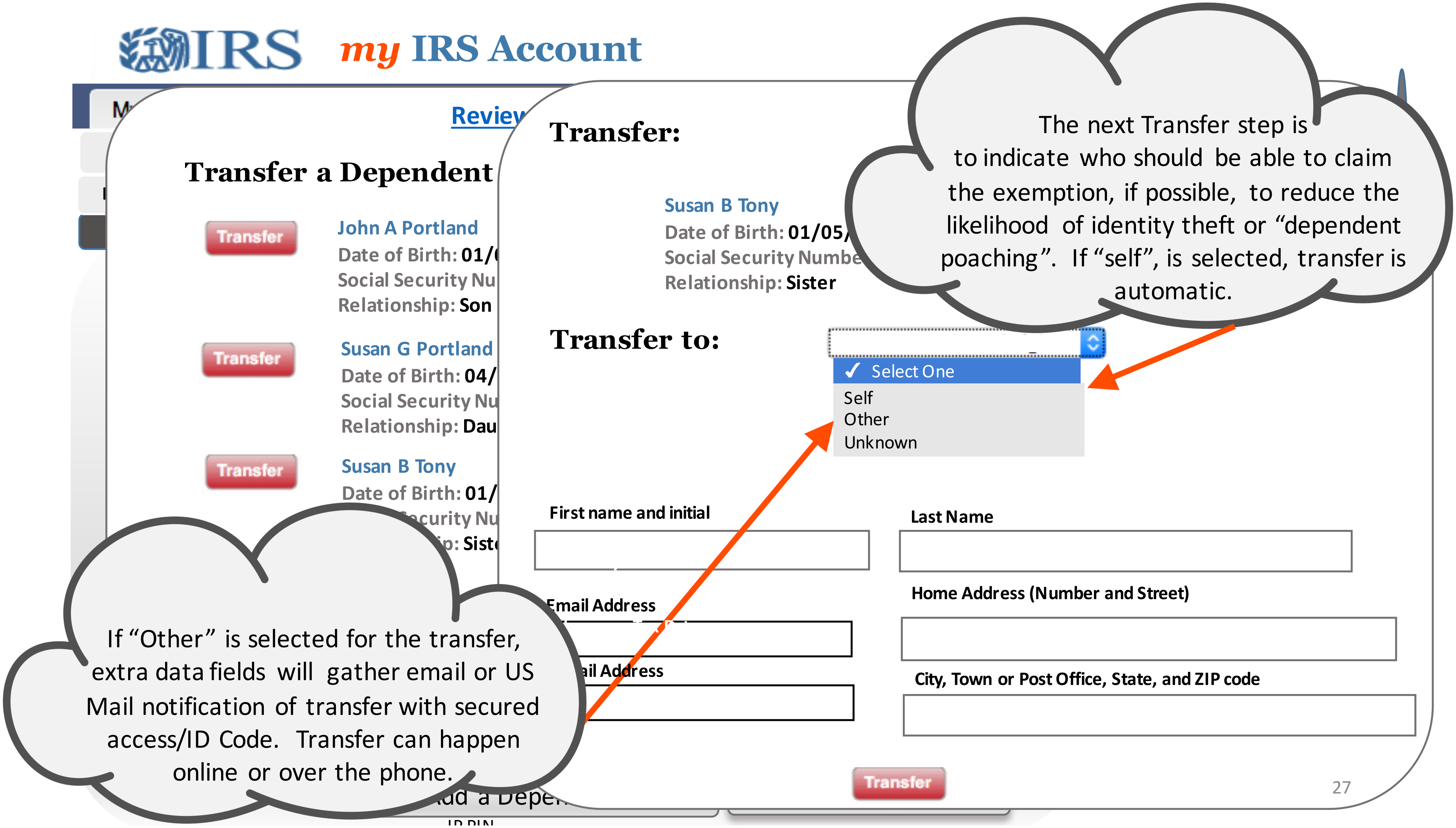
the expenses incurred to allow you to work or look for work, what portion of the expenses was paid for the care recipient(s) to attend kindergarten or a higher grade of school? None

Did you receive dependent care benefits from a dependent care benefits plan or flexible spending account? Yes No

During 2015, was the student enrolled at a postsecondary educational institution eligible to participate in a student aid program administered by the U.S. Department of Education? Yes No

Update Dependency & Eligibility Status


IRS my IRS Account
My Home
Help Center
Security Settings
My Profile
Personal I
Review
Start Over
Return
Transfer a Dependent
Transfer
John A Portland
Date of Birth: 01/01/2006
Social Security Number: XXX-XX-3234
Relationship: Son
Transfer
Susan G Portland
Date of Birth: 04/01/2015
Social Security Number: XXX-XX-4234
Relationship: Daughter
Transfer
Susan B Tony
Date of Birth: 01/05/1976
Social Security Number: XXX-XX-1133
Relationship: Sister
To transfer the exemption for sister-in-law, Susan Tony, the "Transfer a Dependent" functionality is invoked. Then the specific dependent is selected.
your personal exemption(s)
Verify add/update/delete your dependent
Update My Tax Preparer, Power of Attorney and Third Party Designee
02/01/2016
Date Confirmed
01/02/2015
Susan B
Date of Birth: 01/05/1976
Social Security Number: XXX-XX-1133
Relationship: Sister
Medical Expense Deduction: Yes
Tuition and Fees Adjustment or Education Credit: Yes
Add a Dependent
Transfer a Dependent


IRS my IRS Account
Review
Transfer a Dependent
Transfer
John A Portland
Date of Birth: 01/
Social Security Nu
Relationship: Son
Transfer
Susan G Portland
Date of Birth: 04/
Social Security Nu
Relationship: Dau
Transfer
Susan B Tony
Date of Birth: 01/
Transfer:
Susan B Tony
Date of Birth: 01/05/
Social Security Numbe
Relationship: Sister
Transfer to:
Select One
Self
Other
Unknown
First name and initial
Last Name
Email Address
Home Address (Number and Street)
City, Town or Post Office, State, and ZIP code
Transfer
The next Transfer step is to indicate who should be able to claim the exemption, if possible, to reduce the likelihood of identity theft or "dependent poaching". If "self", is selected, transfer is automatic.
If "Other" is selected for the transfer, extra data fields will gather email or US Mail notification of transfer with secured access/ID Code. Transfer can happen online or over the phone.

# my IRS Account

My Home | Help Center | Security Settings

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

Personal Information | My Relationships & Dependents | Insurance In

**Add a Dependent**

First name and initial: Thomas B

Last Name: Portland

Dependent's Social Security Number: XXX-XX-2213

Dependent's Date of Birth: 10/10/1990

Dependent's Relationship to you: Brother-in-law

IP PIN: XXXXXX

Dependent's Transfer Effective Date: 02/16/2016

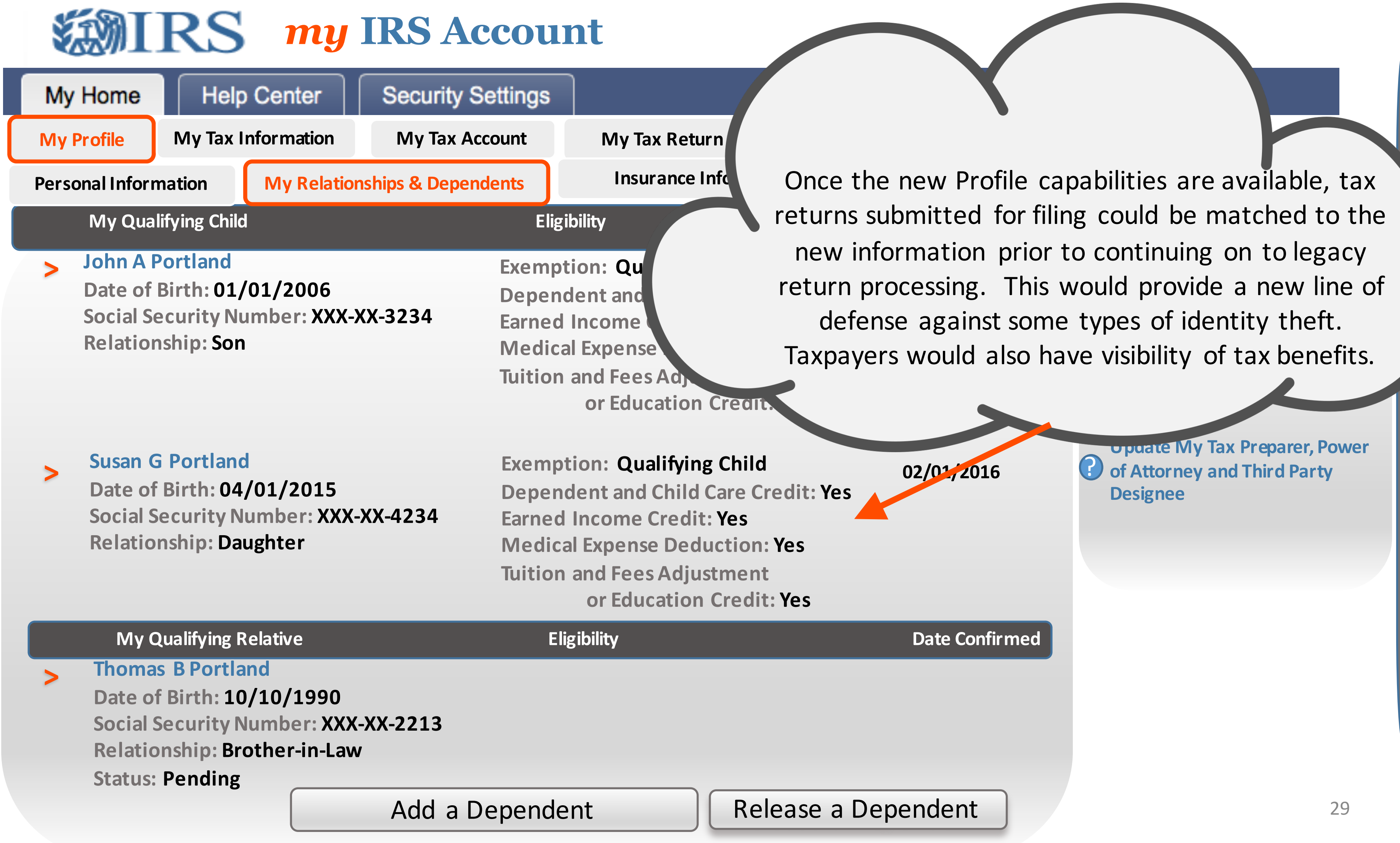
Status: **Pending** Date Confirmed: Last Updated: **02/10/2016 1:05 PM**

Don's adult brother, Thomas needs to be added as a dependent for 2016. Since Thomas has not yet transferred his own dependency, Katherine will add him in a "Pending Status". He won't be "available" to be confirmed until that has happened. In event of a dispute, the issue can be raised to the IRS in advance of the filing date.

hird Party

Add a Dependent

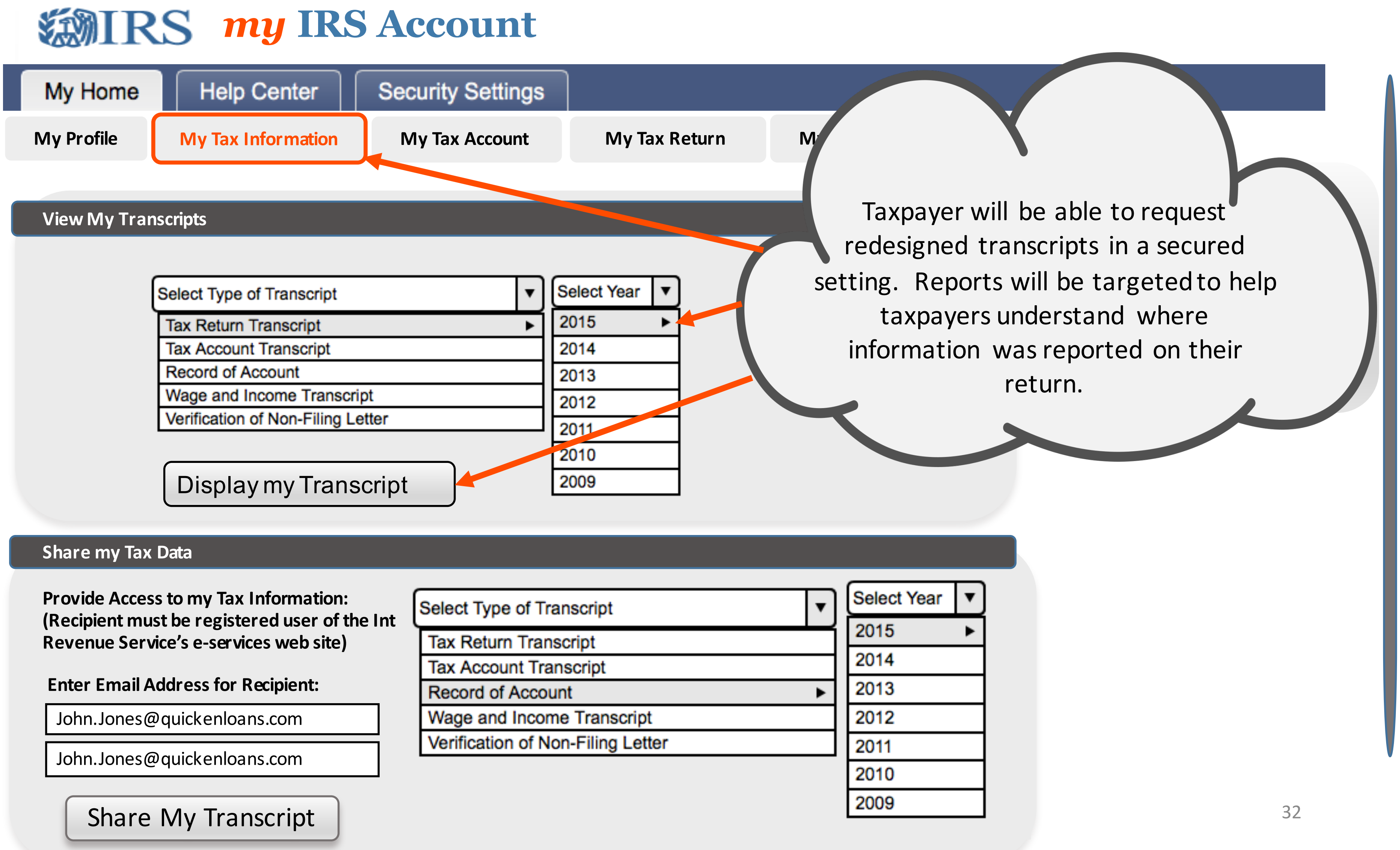
Once the new Profile capabilities are available, tax returns submitted for filing could be matched to the new information prior to continuing on to legacy return processing. This would provide a new line of defense against some types of identity theft. Taxpayers would also have visibility of tax benefits.

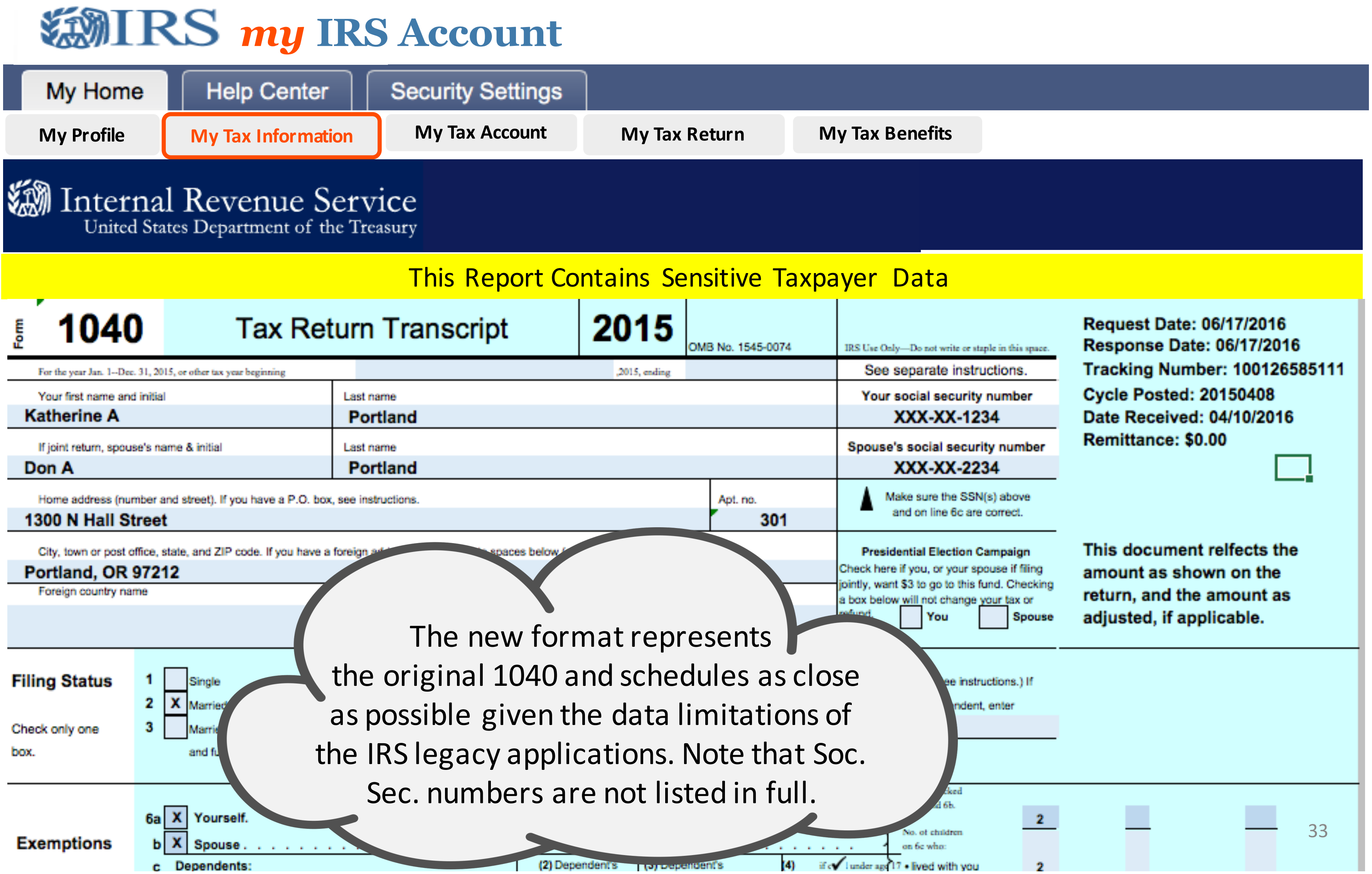


# *my* Tax Information

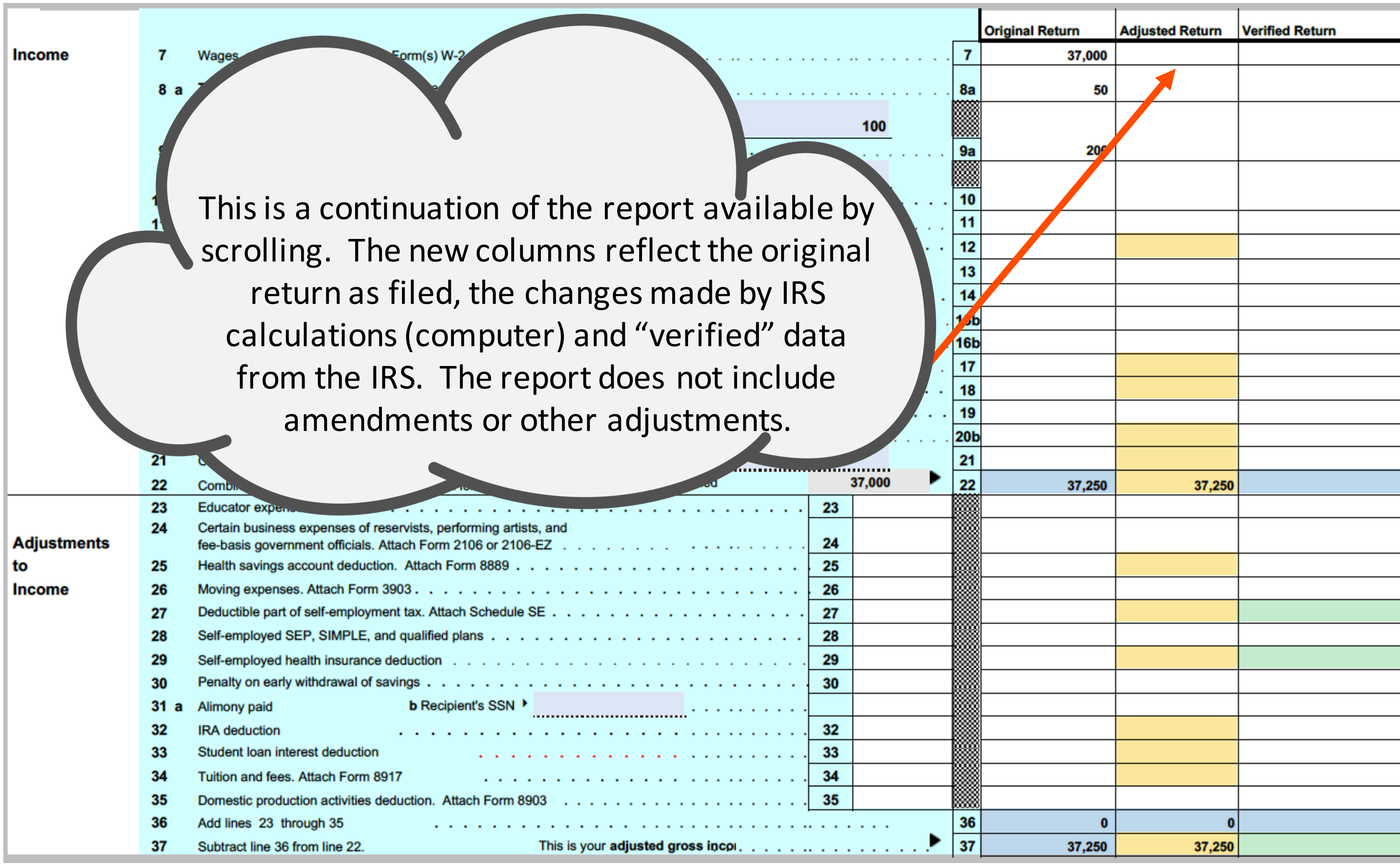
# Scenarios for *my* Tax Information

- 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

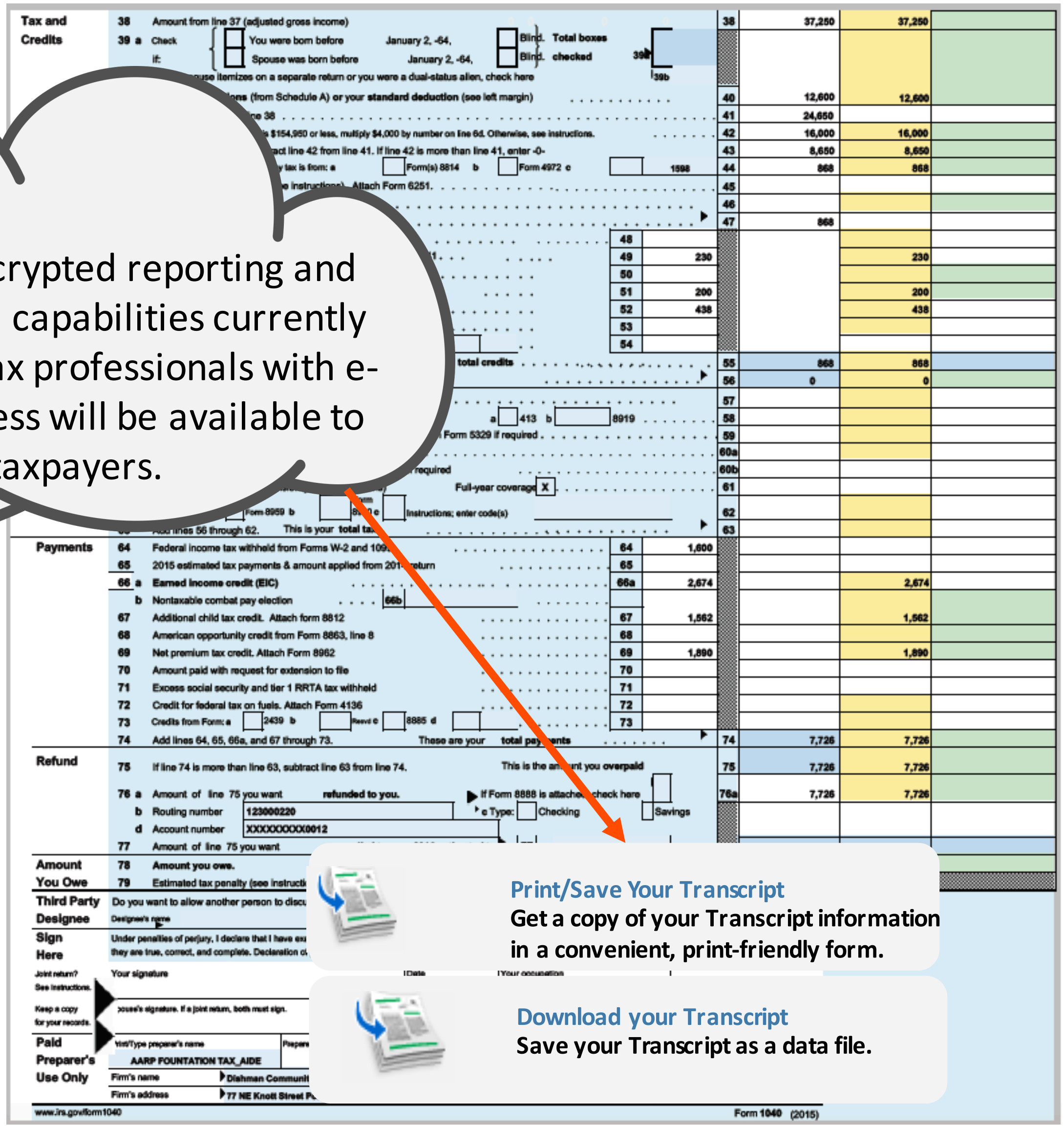



The new format represents the original 1040 and schedules as close as possible given the data limitations of the IRS legacy applications. Note that Soc. Sec. numbers are not listed in full.



| | Line | Description | Line | Amount | Line | 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 | | | |
| | | | | | [illegible] | | | |
| | | | | | 16b | | | |
| | | | | | 17 | | | |
| | | | | | 18 | | | |
| | | | | | 19 | | | |
| | | | | | 20b | | | |
| | 21 | | | | 21 | | | |
| | 22 | Combi… | | 37,000 | 22 | 37,250 | 37,250 | |
| **Adjustments to Income** | 23 | Educator expen… | 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 | |

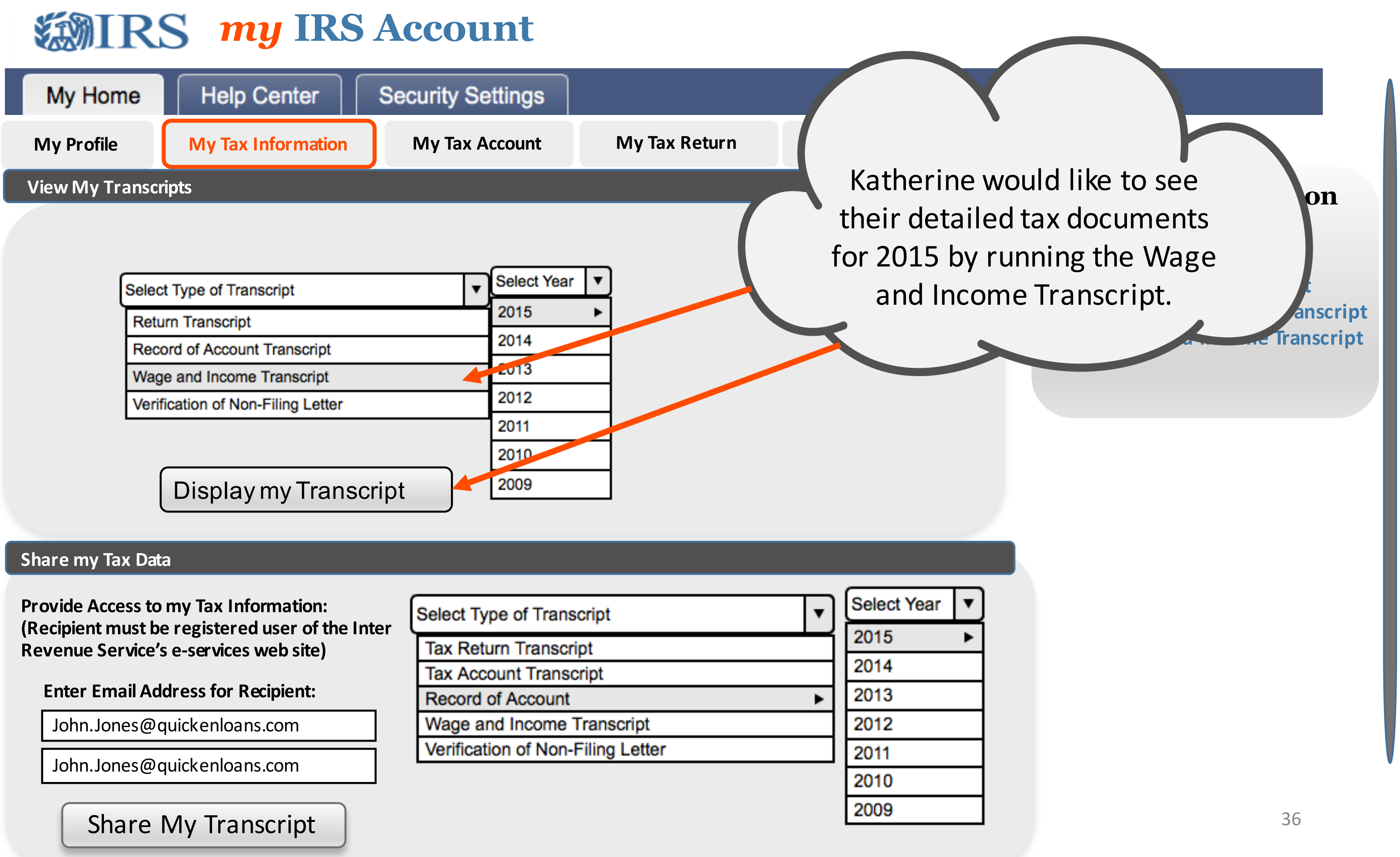
This is a continuation of the report available by scrolling. The new columns reflect the original return as filed, the changes made by IRS calculations (computer) and "verified" data from the IRS. The report does not include amendments or other adjustments.



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

**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
Help Center
Security Settings
My Profile
My Tax Information
My Tax Account
My Tax Return
View My Transcripts
Katherine would like to see their detailed tax documents for 2015 by running the Wage and Income Transcript.
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
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 Compesantion: | |
| 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.

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 9

| | |
|---|---|
| 1. Wages, tips, other compensation<br>$25,000.00 | 2. Federal income tax withheld<br>$1,000.00 |
| 3. Social security wages<br>$26,000.00 | 4. Social security tax withheld<br>$1,612.00 |
| 5. Medicare wages and tips<br>$26,000.00 | 6. Medicare tax withheld<br>$377.00 |
| 7. Social security tips | 8. Allocated tips |
| 9. | 10. Dependant care benefits |
| onqualified plans | 12a. See instructions for box 12<br>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.

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 **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 | 3 Policy issuer's name |
|---|---|---|
| | 7930463 | KAISER FOUNDATION HEALTHPLAN OF |

| 4 Recipient' name | 5 Recipient's SSN | 6 Recipient's date of birth |
|---|---|---|
| KATHERINE A PORTLAND | XXX-XX -1234 | 01/01/ |

| 7 Recipient' spouses's name | 8 Recipient's | Recipient' |
|---|---|---|
| DON A PORTLAND | XXX | 01 |

| 10 Policy start date | 11 Policy Termination Date | 12 St |
|---|---|---|
| 01/01/2015 | 12/31/2015 | |

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 | | | |

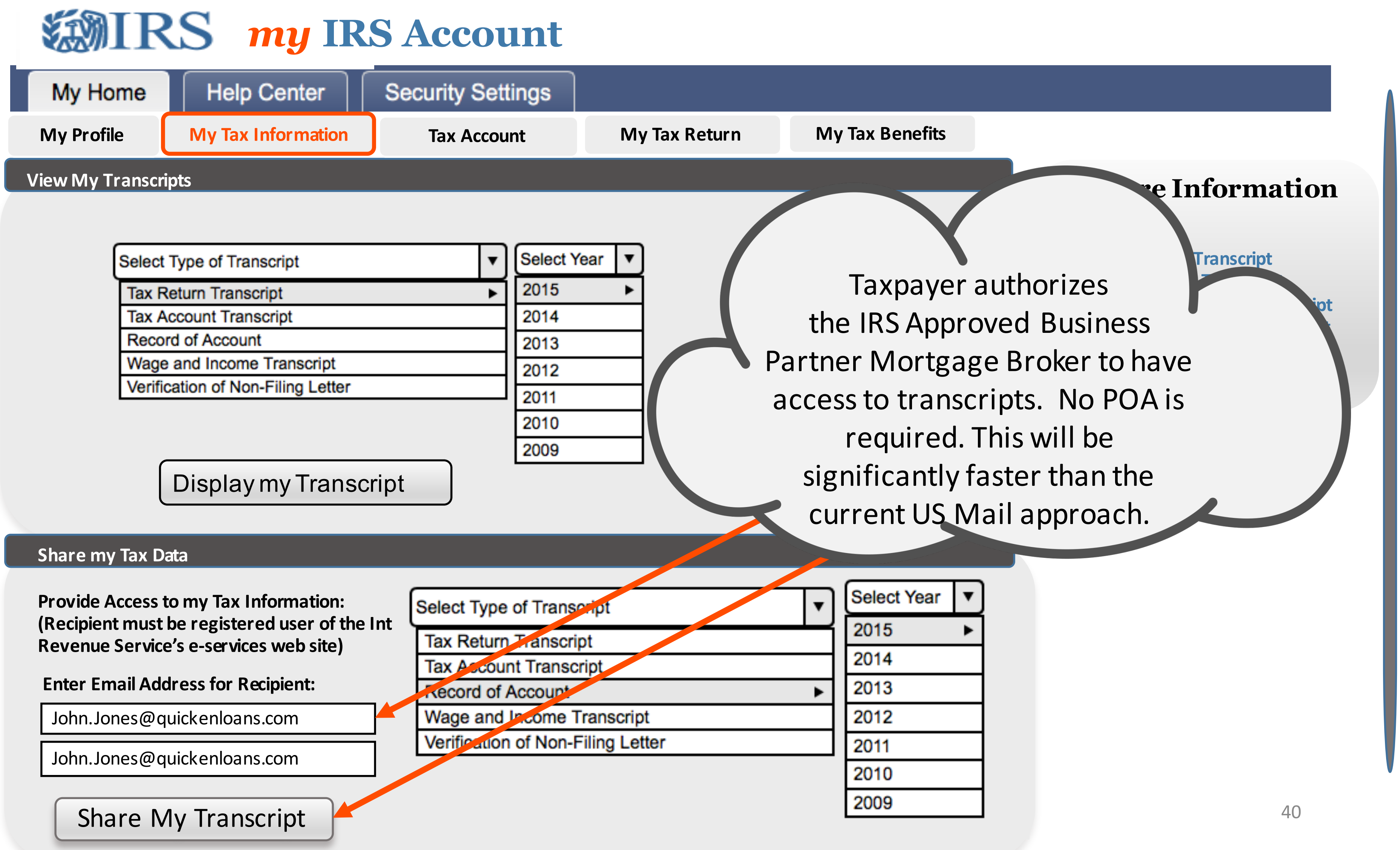
C:\TaxAid

**Part III Household Information**

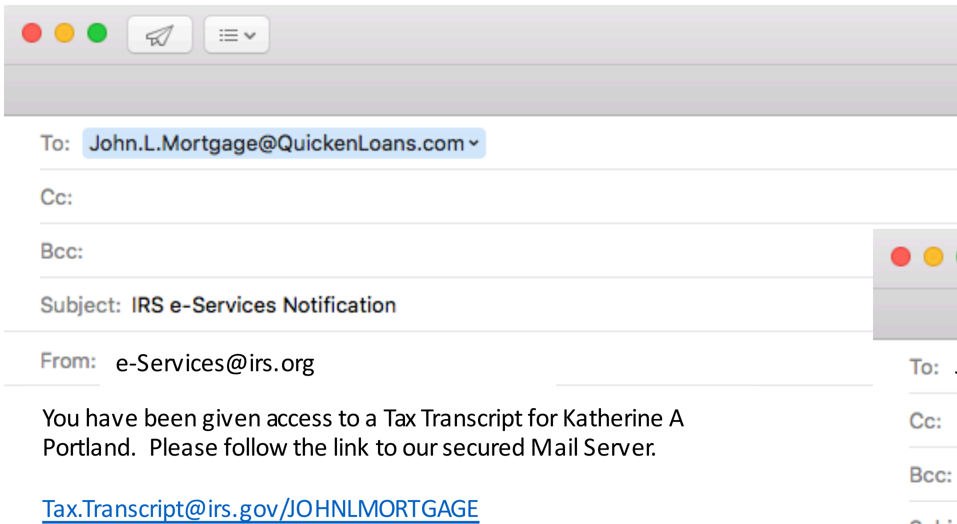
| Month | A Monthly Premium Amount | B Monthly Premium Amount Lowest Cost Silver Plan (SL | |
|---|---|---|---|
| 21 January | $480.00 | $446.00 | |
| 22 February | $480.00 | $446.00 | $60. |
| 23 March | $480.00 | $446.00 | $60.00 |
| 24 April | $560.00 | $560.00 | $300.00 |
| 25 May | $560.00 | $560.00 | $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 | | | |

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

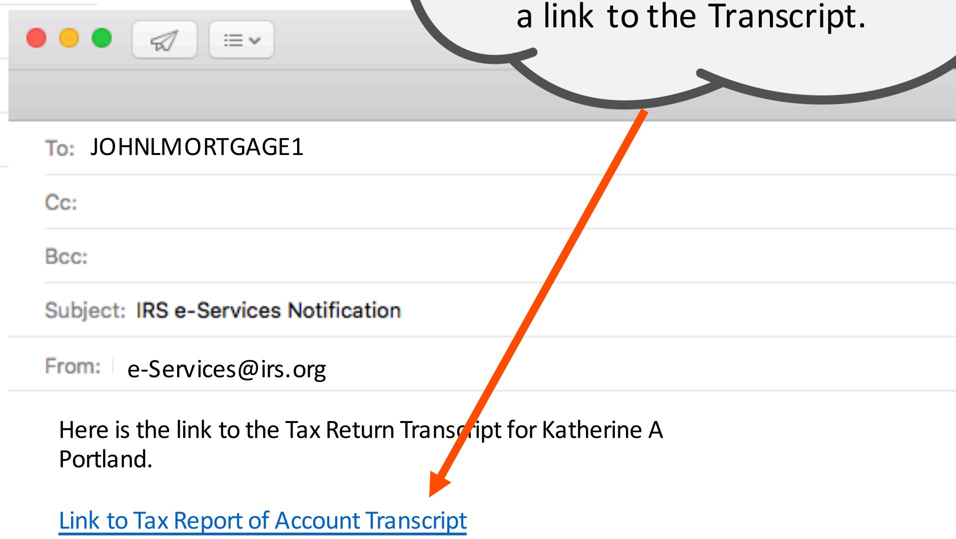
From: e-Services@irs.org

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. Apt. no.
1300 N Hall Street 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. refund. 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… |
|---|---|---|---|
| John Portland | XXX-XX-3234 | SON | X |
| Susan Portland | XXX-XX-4234 | DAUGHTER | X |
| | | | |
| | | | |

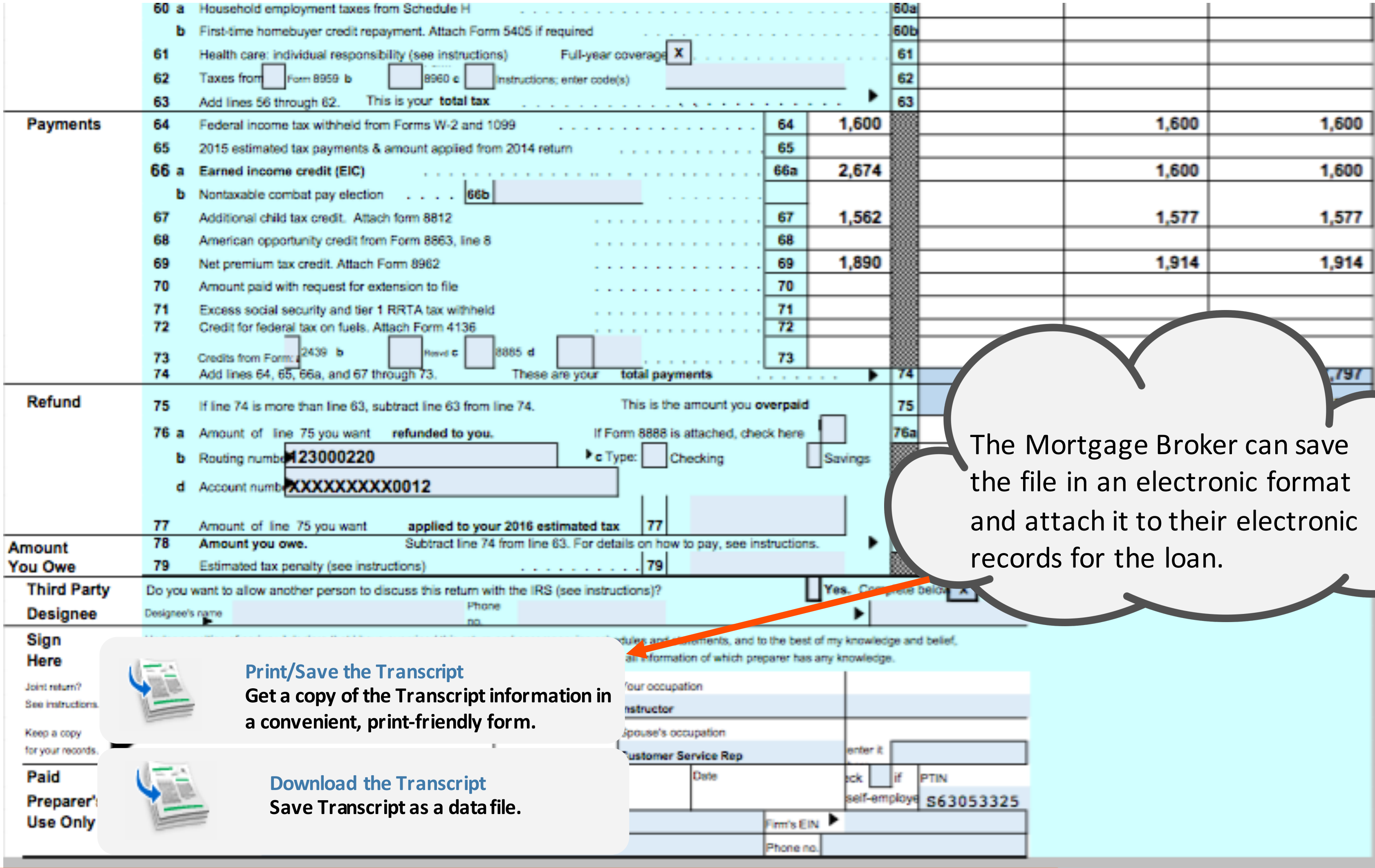
Dependents on … not entered above

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**

| Line | Description | | | 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 | 15b b Taxable amount | | | |
| 16 a | Pensions and annuities | 16a 0 | 16b b Taxable amount | | | |
| 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 | 20b b Taxable amount | | | |
| 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 | | | ,797 |
| 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 | | ...dules 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. | | | | |

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

**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.**

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 Sett...

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**

...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

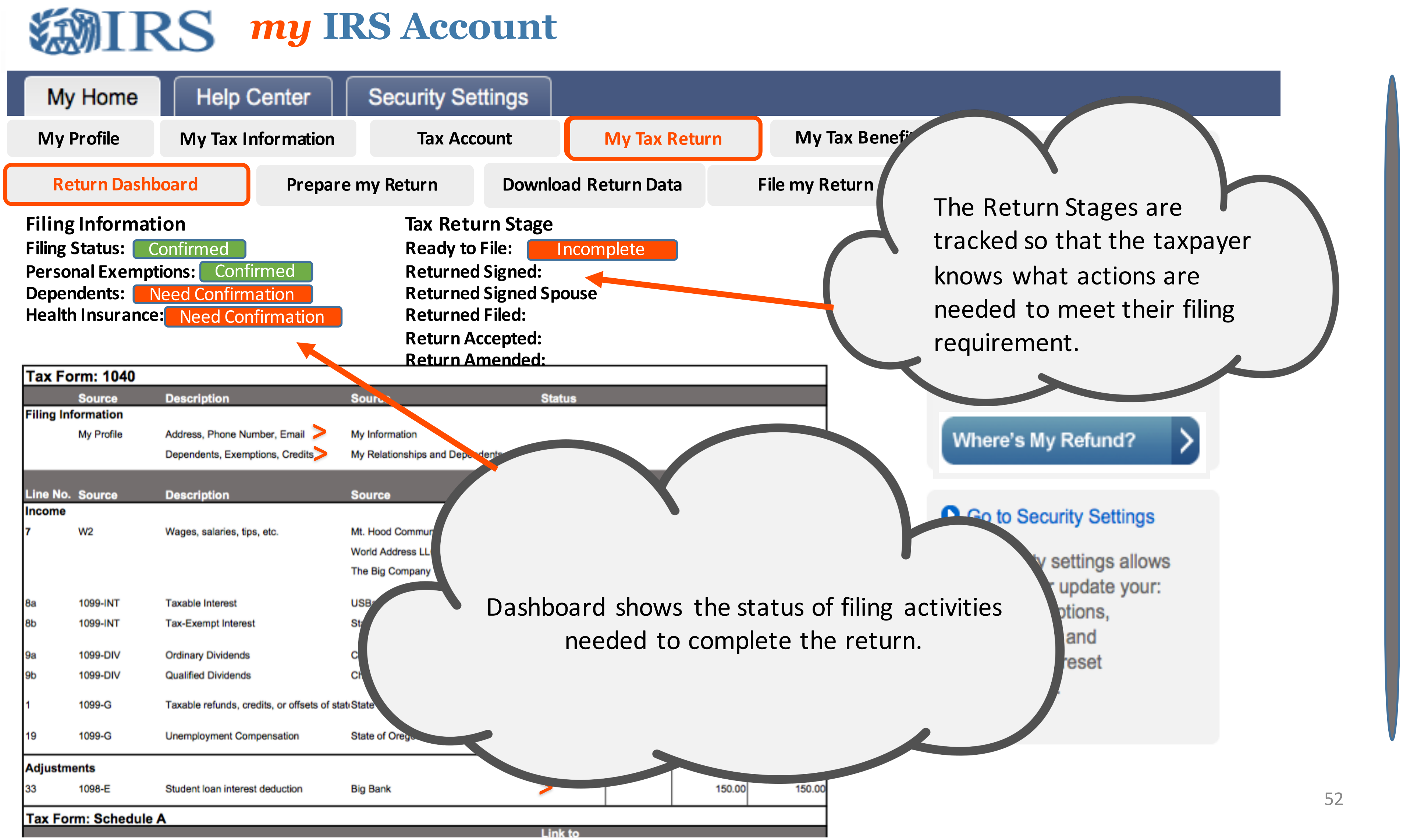
| Account | Date | Transaction | Amount |
|---|---|---|---|
| > Tax Year 2016 | | | -500.00 |
| > Tax Year 2015 | | | 1,461.49 |
| V Tax Year 2014 | | | 0.00 |
| | 4/15/15 | Credit you chose to apply to following tax period's taxes | 735.00 |
| | 4/15/15 | Tax return filed | 2,200.00 |
| | 4/15/15 | 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

# *my* Tax Return

# First Scenario for *my* Tax Return

- Simple Return
  - Return Dashboard – Taxpayer can view the status of most data required and track progress of return preparation.
  - Prepare My Return - Taxpayer verifies details of the return, determines if it is complete, and runs diagnostic process. If diagnostics are “clean”, status of return is changed to “Ready to File”.
  - File My Return – Taxpayer reviews return, verifies bank accounts and signs the return. If Single, Married filing Separate or Head of Household filing status, return can be filed immediately. If Married filing Joint filing status, once both spouses have signed the return with no changes, the return can be filed.


IRS my IRS Account
My Home
Help Center
Security Settings
My Profile
My Tax Information
Tax Account
My Tax Return
Return Dashboard
Prepare my Return
Download Return Data
File my Return
Filing Information
Filing Status: Confirmed
Personal Exemptions: Confirmed
Dependents: Need Confirmation
Health Insurance: Need Confirmation
Tax Return Stage
Ready to File: Incomplete
Returned Signed:
Returned Signed Spouse
Returned Filed:
Return Accepted:
Return Amended:
The Return Stages are tracked so that the taxpayer knows what actions are needed to meet their filing requirement.
Tax Form: 1040
Source
Description
Status
Filing Information
My Profile
Address, Phone Number, Email
My Information
Dependents, Exemptions, Credits
Line No.
Income
7
W2
Wages, salaries, tips, etc.
8a
1099-INT
Taxable Interest
8b
1099-INT
Tax-Exempt Interest
9a
1099-DIV
Ordinary Dividends
9b
1099-DIV
Qualified Dividends
1
1099-G
19
1099-G
Unemployment Compensation
Adjustments
33
1098-E
Student loan interest deduction
Big Bank
150.00
150.00
Tax Form: Schedule A
Where's My Refund?
Go to Security Settings
Dashboard shows the status of filing activities needed to complete the return.

# IRS *my* IRS Account

My Home | Help Center | Security Settings

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

**Return Dashboard** | Prepare My Return | Download Return Data | File my Return

**Filing Information**

**Filing Status:** Confirmed
**Personal Exemptions:** Confirmed
**Dependents:** Need Confirmation
**Health Insurance:** Need Confirmation

**Tax Return Stage**

**Ready to File:** Incomplete
**Returned Signed:**
**Return Signed by Spouse:**
**Returned Filed:**
**Return Accepted:**
**Return Amended:**

**Tax Form: 1040**

| | Source | Description | Source | Status |
|---|---|---|---|---|
| **Filing Information** | | | | |
| | My Profile | Address, Phone Number, Email | > My Information | |
| | | Dependents, Exemptions, Credits | > My Relationships and Dependents | |

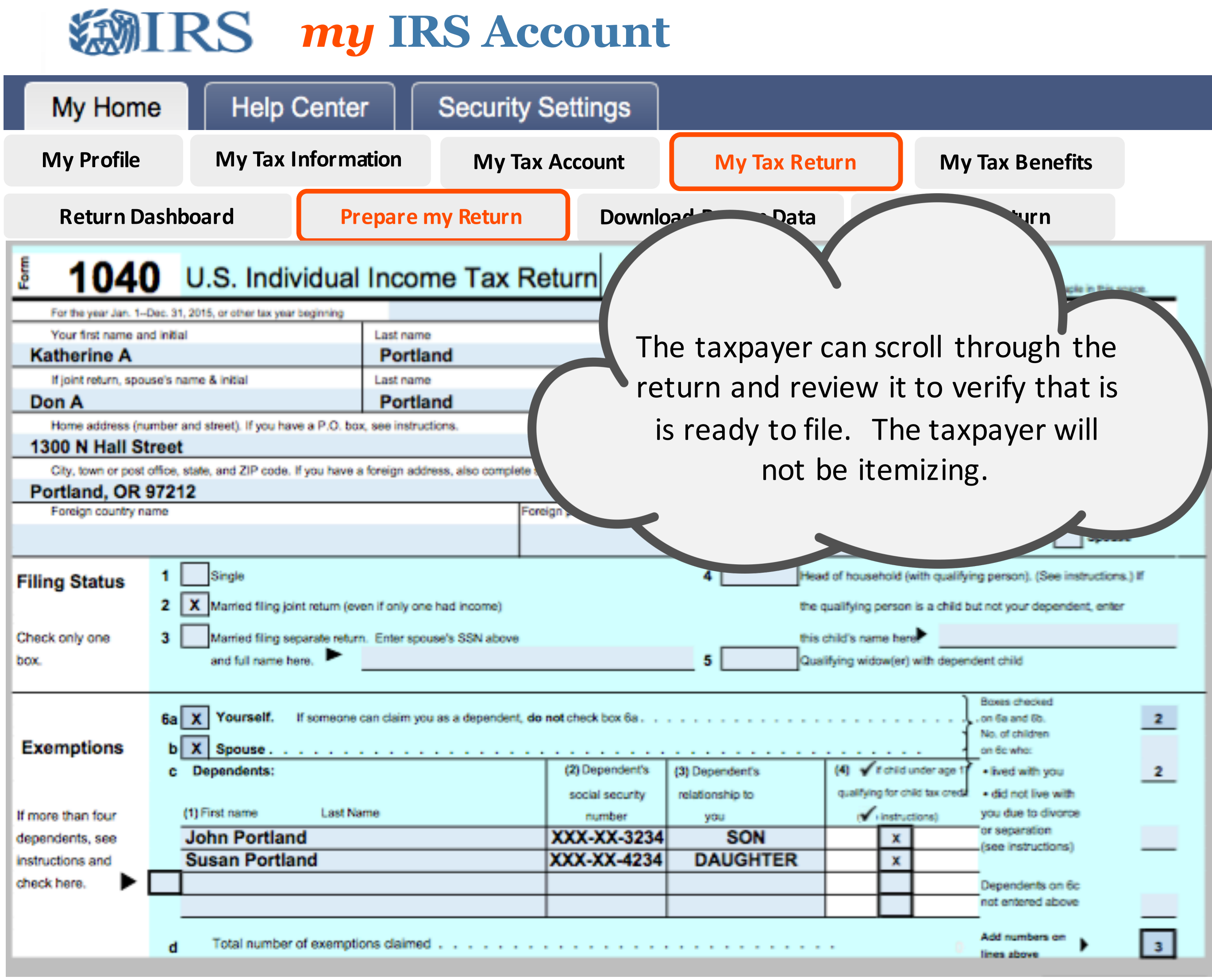
| Line No. | Source | Description | Source | Link to Source | Prior Year | Current Year | Difference |
|---|---|---|---|---|---|---|---|
| **Income** | | | | | | | |
| 7 | W2 | Wages, salaries, tips, etc. | Mt. Hood Community College | > | 24,000.00 | 25,000.00 | 1,000.00 |
| | | | World Address LLC | > | 9,000.00 | 12,000.00 | 3,000.00 |
| | | | The Big Company | | 2,000.00 | | -2,000.00 |
| 8a | 1099-INT | Taxable Interest | USBank | > | 20.00 | 50.00 | 30.00 |
| 8b | 1099-INT | Tax-Exempt Interest | State of Oregon Bonds | > | 80.00 | 100.00 | 20.00 |
| 9a | 1099-DIV | Ordinary Dividends | Charles Schwab | > | 0.00 | 200.00 | |
| 9b | 1099-DIV | Qualified Dividends | Charles Schwab | > | 0.00 | 200.00 | |
| 1 | 1099-G | Taxable refunds, credits, or offsets of stat | State of Oregon | | 560.00 | 500.00 | |
| 19 | 1099-G | Unemployment Compensation | State of Oregon Employment Division | > | 2,000.00 | | |
| **Adjustments** | | | | | | | |
| 33 | 1098-E | Student loan interest deduction | Big Bank | > | | 150.00 | 150.00 |

**Tax Form: Schedule A**

Dashboard lists all tax documents from the past year compared to current. This may alert taxpayer if something is missing this year or if there has been a delay in processing.

Where's My Refund?

Dashboard identifies tax documents that have arrived electronically at the IRS. Links show source documents. This eliminates need to send W2's. 1099's, 1098's etc. to taxpayers.



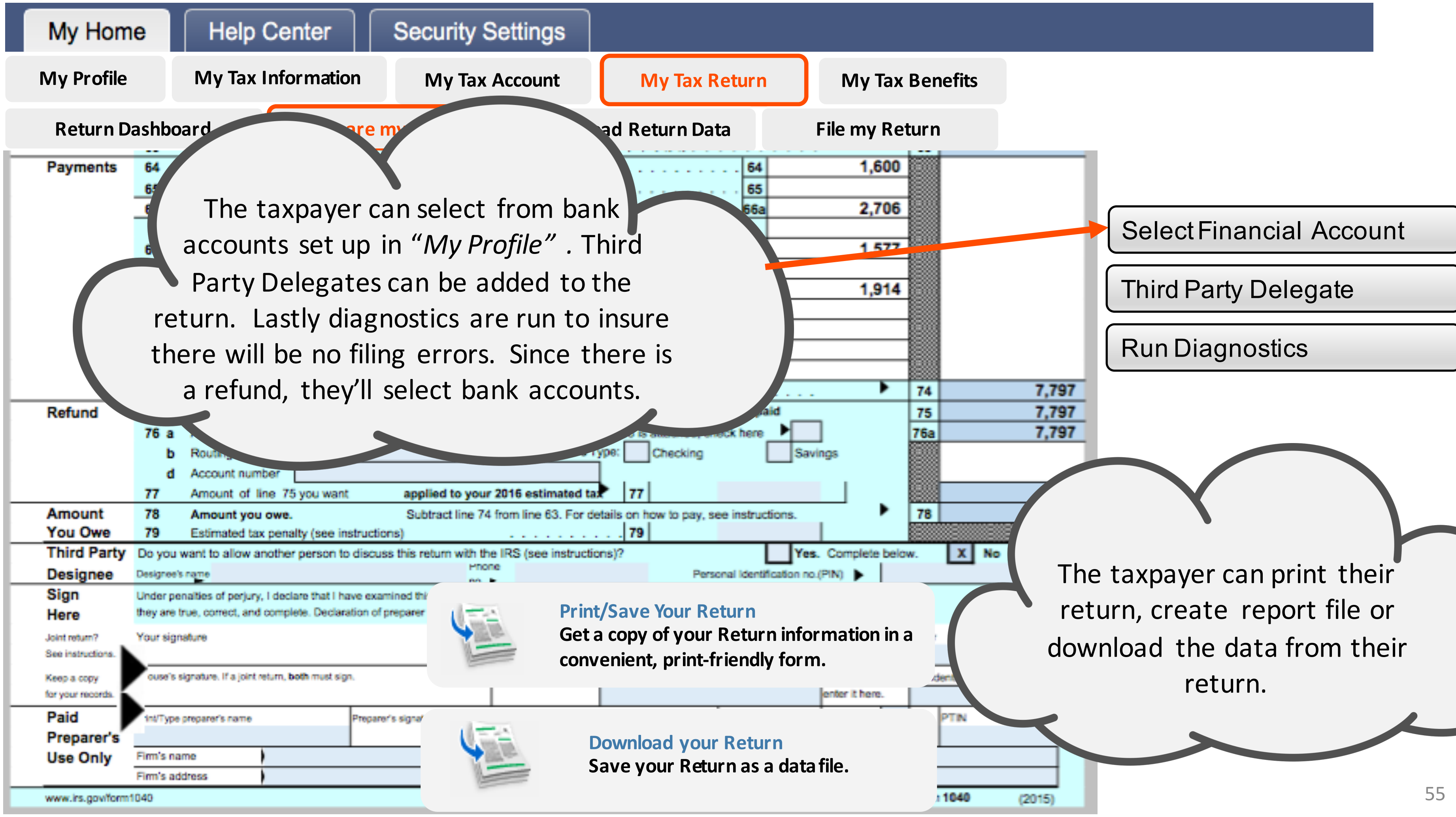

The taxpayer can scroll through the return and review it to verify that is is ready to file. The taxpayer will not be itemizing.

Select Financial Account

Third Party Delegate

Run Diagnostics

*my* IRS Account




The taxpayer can select from bank accounts set up in "*My Profile*". Third Party Delegates can be added to the return. Lastly diagnostics are run to insure there will be no filing errors. Since there is a refund, they'll select bank accounts.

The taxpayer can print their return, create report file or download the data from their return.

IRS *my* IRS Account

My Hom… | …ttings

My Profi… | My Tax Return | My Tax Benefits

…Return Data | File my Return

The first account selected will be the Checking account.

Review | Start Over | Return

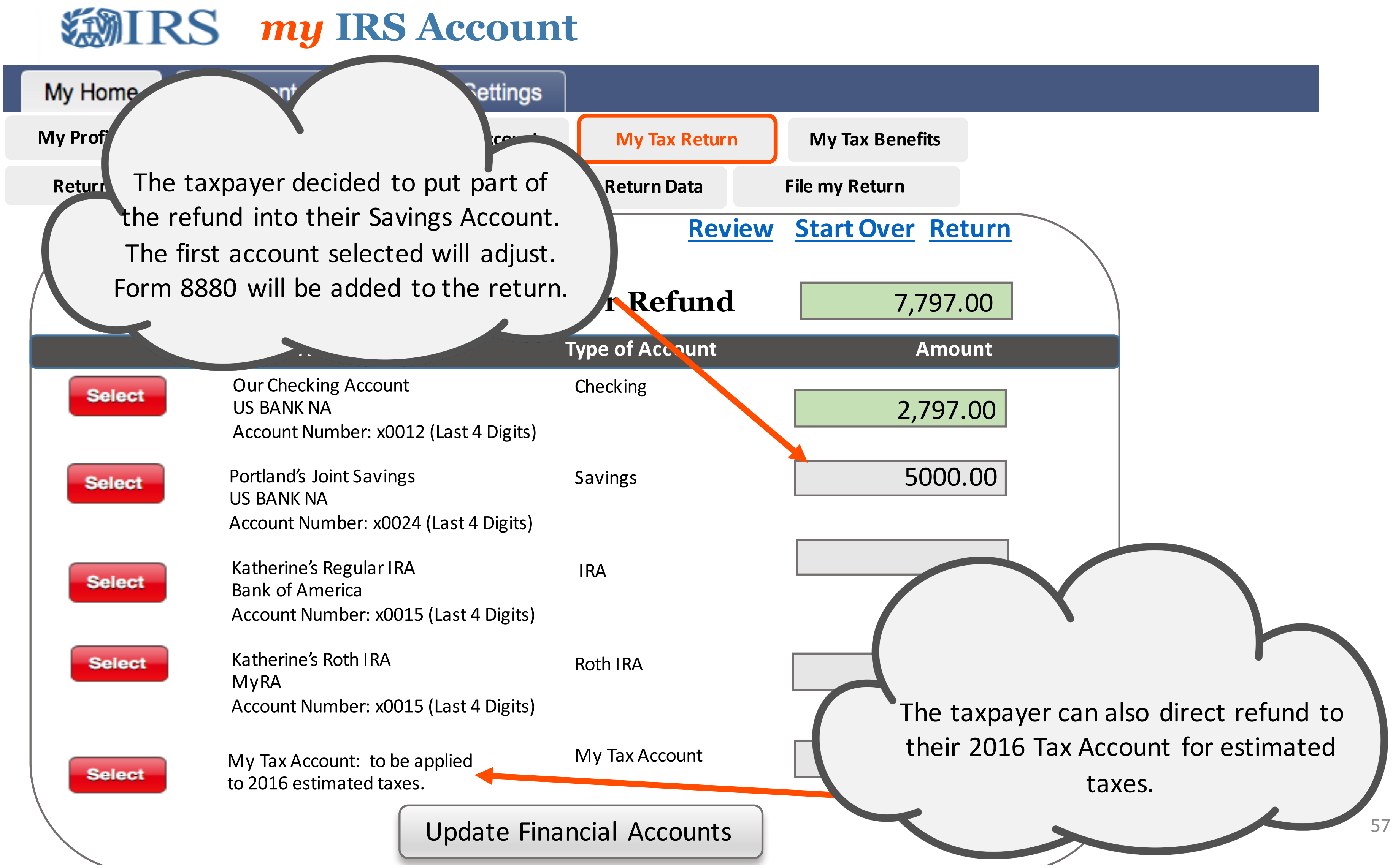
## …Financial Accounts for Refund

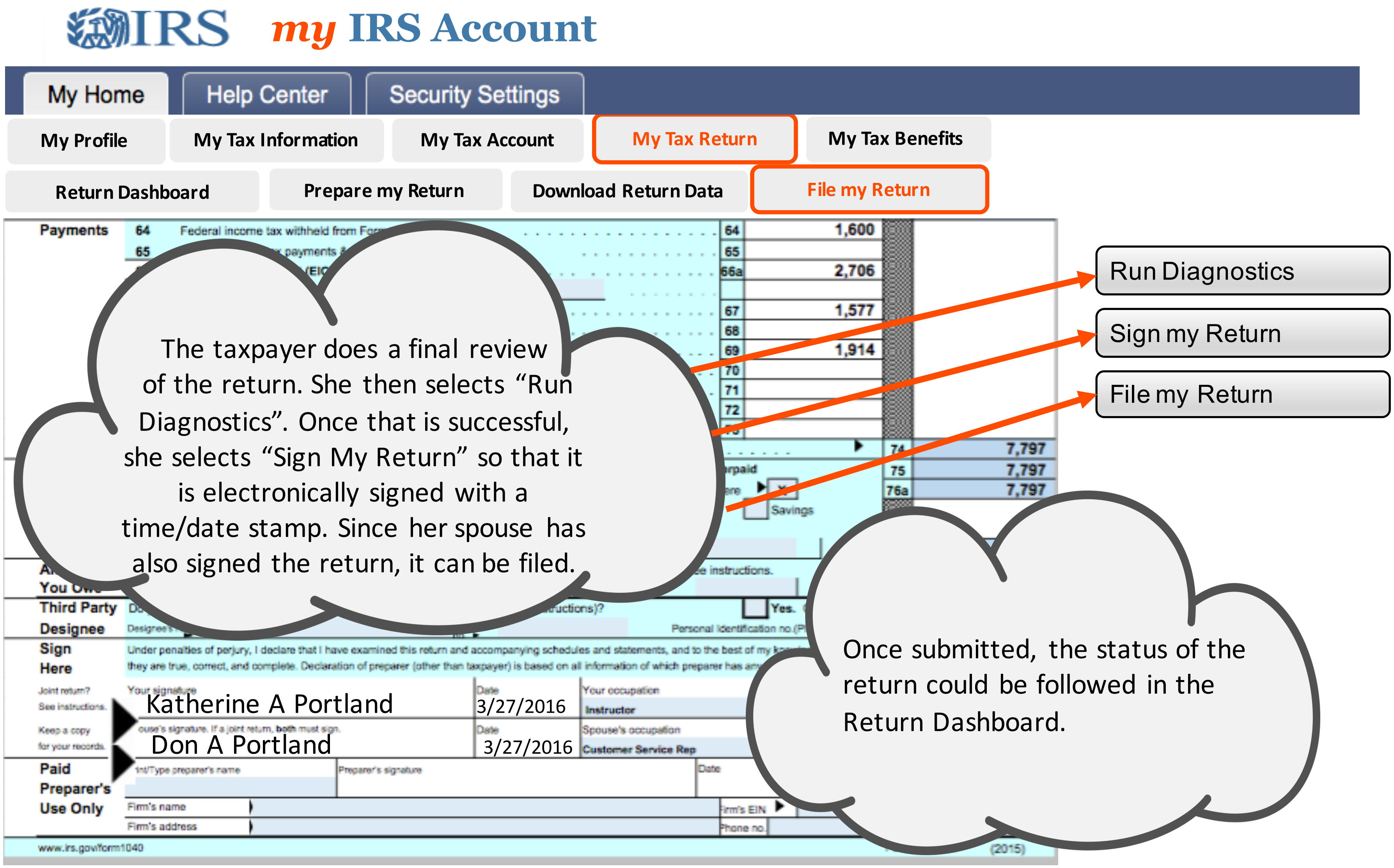
7,797.00

| | Financial Account | Type of Account | Amount |
|---|---|---|---|
| Select | Our Checking Account<br>US BANK NA<br>Account Number: x0012 (Last 4 Digits) | Checking | 7,797.00 |
| Select | Portland's Joint Savings<br>US BANK NA<br>Account Number: x0024 (Last 4 Digits) | Savings | |
| Select | Katherine's Regular IRA<br>Bank of America<br>Account Number: x0015 (Last 4 Digits) | IRA | |
| Select | Katherine's Roth IRA<br>MyRA<br>Account Number: x0015 (Last 4 Digits) | Roth IRA | |
| Select | My Tax Account: to be applied<br>to 2016 estimated taxes. | My Tax Account | |

Update Financial Accounts

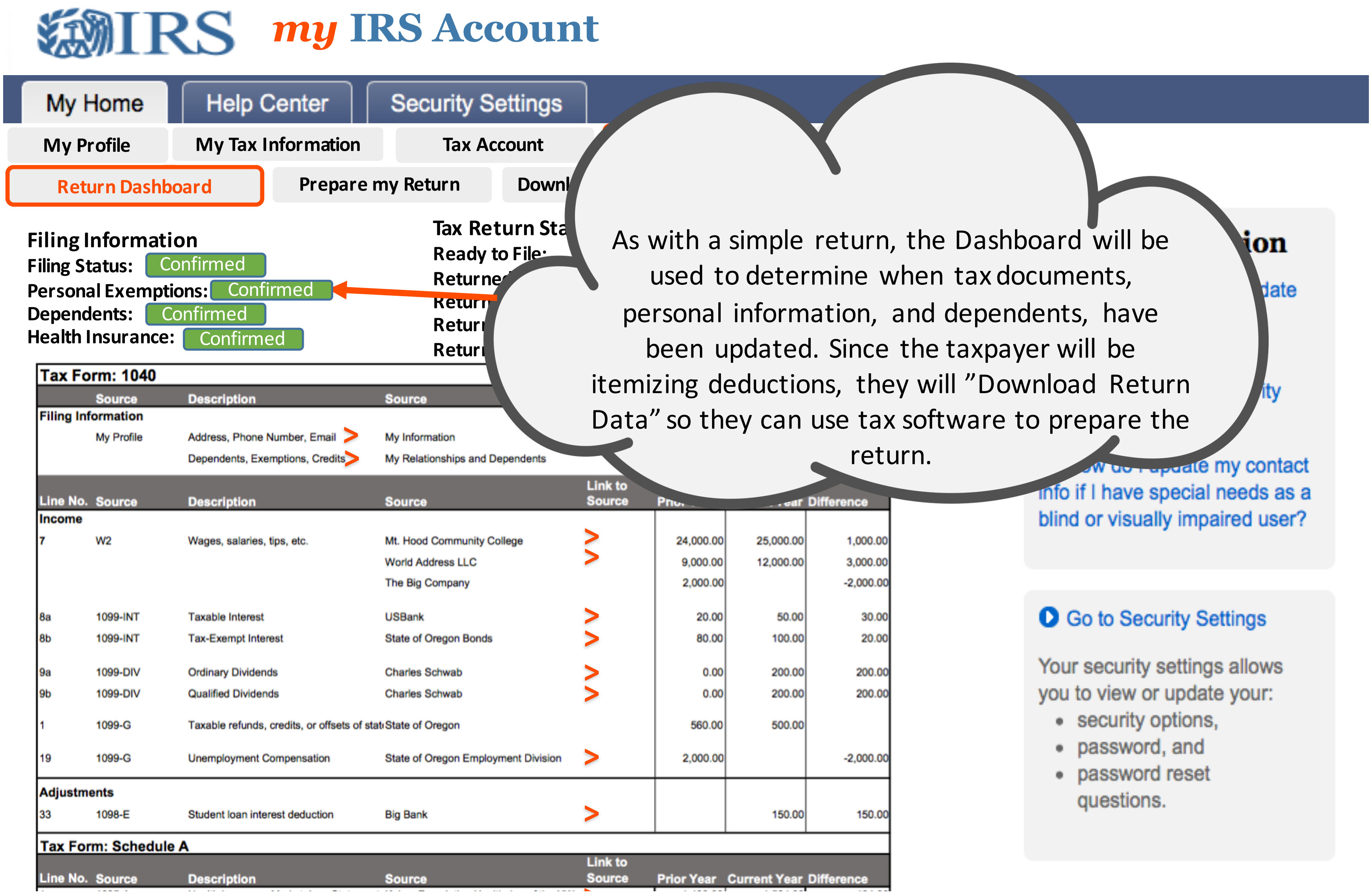
Amount will default to the entire refund. If a second account is chosen, the balance in the first will be reduced. The amount will always be calculated.


IRS my IRS Account
My Home
Settings
My Tax Return
My Tax Benefits
Return Data
File my Return
Review
Start Over
Return
Refund
7,797.00
Type of Account
Amount
Select
Our Checking Account
US BANK NA
Account Number: x0012 (Last 4 Digits)
Checking
2,797.00
Select
Portland's Joint Savings
US BANK NA
Account Number: x0024 (Last 4 Digits)
Savings
5000.00
Select
Katherine's Regular IRA
Bank of America
Account Number: x0015 (Last 4 Digits)
IRA
Select
Katherine's Roth IRA
MyRA
Account Number: x0015 (Last 4 Digits)
Roth IRA
Select
My Tax Account: to be applied to 2016 estimated taxes.
My Tax Account
Update Financial Accounts
The taxpayer decided to put part of the refund into their Savings Account. The first account selected will adjust. Form 8880 will be added to the return.
The taxpayer can also direct refund to their 2016 Tax Account for estimated taxes.

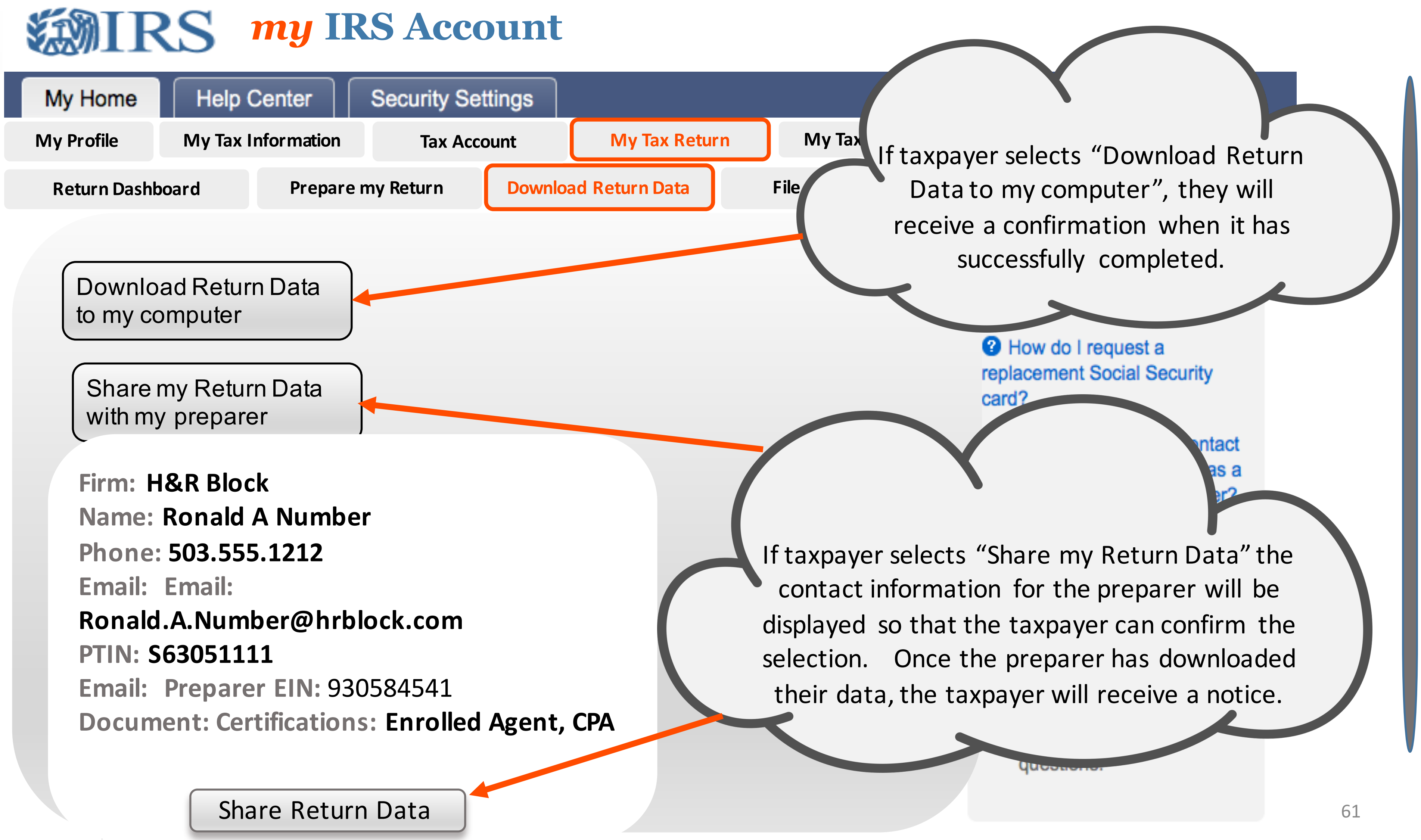

IRS my IRS Account
My Home
Help Center
Security Settings
My Profile
My Tax Information
My Tax Account
My Tax Return
My Tax Benefits
Return Dashboard
Prepare my Return
Download Return Data
File my Return
Run Diagnostics
Sign my Return
File my Return
The taxpayer does a final review of the return. She then selects "Run Diagnostics". Once that is successful, she selects "Sign My Return" so that it is electronically signed with a time/date stamp. Since her spouse has also signed the return, it can be filed.
Once submitted, the status of the return could be followed in the Return Dashboard.
Payments
Third Party Designee
Sign Here
Katherine A Portland
3/27/2016
Instructor
Don A Portland
3/27/2016
Customer Service Rep
Paid Preparer's Use Only
1,600
2,706
1,577
1,914
7,797
7,797
7,797
www.irs.gov/form1040
(2015)

# Second Scenario for *my* Tax Return

- Complex Return
  - Return Dashboard – Taxpayer can view the availability of most data to see progress for the return.
  - Download Return Data – Taxpayer can download their tax data to the tax software package of their choice or give access to download the data to their paid preparer.
  - Preparer transmits the return to the IRS.
  - File My Return – Taxpayer reviews return, verifies bank accounts and signs the return. If a Single, Married filing Separate or Head of Household filing status, return can be filed. If Married filing Joint filing status, once both spouses have signed the return with no changes, then the return can be filed.




As with a simple return, the Dashboard will be used to determine when tax documents, personal information, and dependents, have been updated. Since the taxpayer will be itemizing deductions, they will "Download Return Data" so they can use tax software to prepare the return.


IRS my IRS Account
My Home
Help Center
Security Settings
My Profile
My Tax Information
Tax Account
My Tax Return
My Tax
Return Dashboard
Prepare my Return
Download Return Data
File
Download Return Data to my computer
Share my Return Data with my preparer
If taxpayer selects "Download Return Data to my computer", they will receive a confirmation when it has successfully completed.
How do I request a replacement Social Security card?
Firm: H&R Block
Name: Ronald A Number
Phone: 503.555.1212
Email: Email:
Ronald.A.Number@hrblock.com
PTIN: S63051111
Email: Preparer EIN: 930584541
Document: Certifications: Enrolled Agent, CPA
Share Return Data
If taxpayer selects "Share my Return Data" the contact information for the preparer will be displayed so that the taxpayer can confirm the selection. Once the preparer has downloaded their data, the taxpayer will receive a notice.

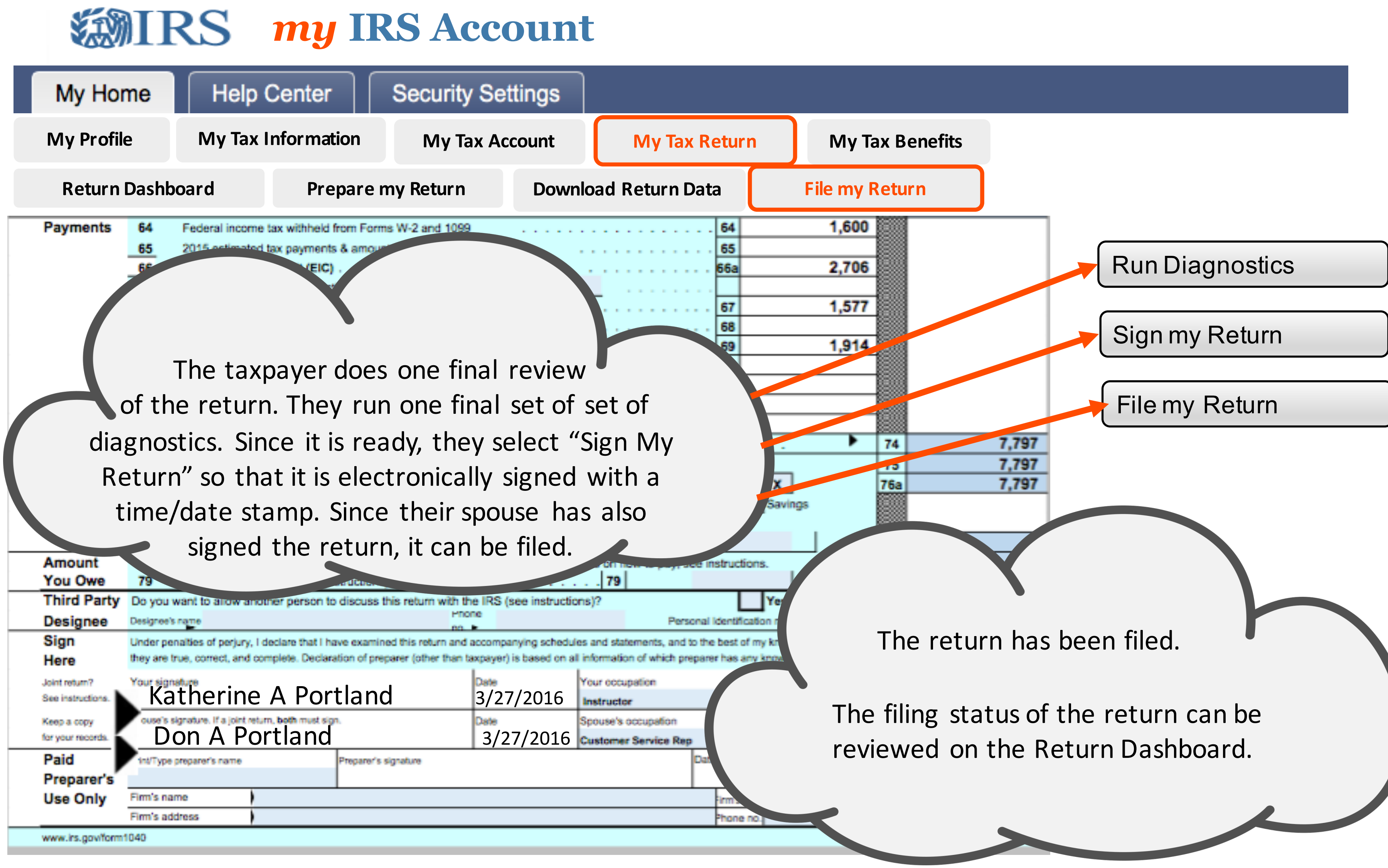
## Taxpayer prepares the return:

Taxpayer completes the return with Tax Software. If applicable, they will run diagnostics and then transmit the return to the IRS. Once the Return has been processed by the IRS, the taxpayer will be notified that the return is is ready to be filed.

OR

## Professional Preparer prepares the return:

Professional Preparer completes return with Tax Software. When done, they will run diagnostics and then transmit the return to the IRS. Once the Return has been processed by the IRS, the taxpayer will be notified that the return has been processed and is ready to be filed.


my IRS Account
My Home
Help Center
Security Settings
My Profile
My Tax Information
My Tax Account
My Tax Return
My Tax Benefits
Return Dashboard
Prepare my Return
Download Return Data
File my Return
Payments
Federal income tax withheld from Forms W-2 and 1099
1,600
2,706
1,577
1,914
7,797
7,797
7,797
Amount You Owe
Third Party Designee
Sign Here
Katherine A Portland
3/27/2016
Instructor
Don A Portland
3/27/2016
Customer Service Rep
Paid Preparer's Use Only
Firm's name
Firm's address
www.irs.gov/form1040
Run Diagnostics
Sign my Return
File my Return
The taxpayer does one final review of the return. They run one final set of set of diagnostics. Since it is ready, they select "Sign My Return" so that it is electronically signed with a time/date stamp. Since their spouse has also signed the return, it can be filed.
The return has been filed.
The filing status of the return can be reviewed on the Return Dashboard.

# *my* Tax Benefits

# Scenarios for *my* Tax Benefits

- Taxpayer will be provided data on tax benefits already included in their return.
- They will be able to investigate potential benefits and savings.
- Suggestions will be made based upon the data context in the return. Examples could be:
    - Education credits based upon the 1098T if not at the maximum for the credit
    - Retirement Savings potential
    - Double benefit if company 401K has company matching
    - If there is a Shared Responsibility Payment could there be exemptions?

IRS **my IRS Account**

My Home | Help Center | Security Settings

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

### My Current Tax Benefits

| Source | | | | |
|---|---|---|---|---|
| Line 47 | Tax on original return | | | 853 |
| | Income that is deferred from taxes | | | |
| W-2 Line 12D | | 401K Contribution at work | $1,000 | |
| | Income that is not taxed | | | |
| Line 8b | | Tax-exempt Interest | 100 | |
| | Income Taxed at a lower Rate | | | |
| Line 33 | | | | |
| | Adjustments | | | |
| | | Student Loan Interest Deduction | 150 | |
| | Total income not subject to tax | | 1,250 | |
| | | Tax Rate: | 10.00% | |
| | | Tax Savings | 125 | 125 |
| | Tax Credits | | | |
| Line 49 | | Child and Dependent Care Credit | 230 | |
| Line 51 | | Retirement Savings Contributions Credit | 200 | |
| Line 423 | | Child Tax Credit | 423 | |
| | Refundable Credits | | | |
| Line 66a | | Earned Income Credit | 2706 | |
| Line 67 | | Additonal Child Tax Credit | 1577 | |
| Form 1095-A | | Total Premium Tax Credit | 4638 | |
| | | Total Credits: | 9774 | 9774 |
| | | Total Savings Plus Credits | | 9899 |
| | Total Tax Benefits less Tax Due | | | 9,046 |

### Potential Benefits

This year:
Consider a larger contribution to an IRA Account (Line 32). Tax savings on $600 would increase your refund by over $500.

Would you be eligible for an exemption from the Line 61 Individual Responsibility Payment of $54?
[Health Coverage Exemptions]

Next year:

If your com
funds for
provide
matchin

**Questions?**
The Interactive Tax Assistant can help

Get a Response to Your Tax Question

Tax Benefits will show current benefits and offer suggestions for potential benefits based upon return data.