

IRS TRANSCRIPTS ONLINE SERVICE REINSTATED

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The IRS allows taxpayers to log in to the IRS system and retrieve a transcript of their accounts. However, the transcript online service was shut down in May 2015 due to a data breach. It was reopened as of the first week of June 2016. The authentication process used to gain access to the taxpayer information has been revamped to prevent further unauthorized access.

The new process requires several different pieces of information for the registration process. Taxpayers

must have:

1. A readily available email address
2. Their social security number or individual tax identification number
3. The filing status and address on their last filed tax return
4. Access to certain account numbers for their credit cards, home mortgage loan, second mortgage loan, home equity line of credit or car loan
5. A readily available U.S. based mobile phone with their name on the phone account (landlines, skype, google voice or other virtual or pay-as-you-go phones are not acceptable)
6. A temporary lift on any “credit freeze” on their credit records through Equifax

Once this information is collected, taxpayers will be ready to go to the website and set up their user account.

First time users of the service will be required to:

1. Submit their name and email address to receive a confirmation code
2. Enter the emailed confirmation code
3. Provide their SSN, date of birth, filing status and address on their last filed tax return
4. Provide certain financial account information for verification such as the last eight digits of their credit card, car loan or home mortgage account number
5. Enter a mobile phone number to receive a six-digit activation code via text message
6. Enter the activation code
7. Create a username and password, create a site phrase, and select a site image



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Returning Users who have not yet completed the new process must:

1. Log in with an existing username and password
2. Submit financial information for verification
3. Submit a mobile phone number to receive an activation code via text message
4. Enter the activation code

Once taxpayers have registered with the new system, they can come back and log in with their username and password. They will receive a security code via the mobile phone number that they provided upon registration. This number will need to be entered to access the system.

Taxpayers who cannot get the process to work can go online and request "Get Transcript by Mail". The IRS will mail the transcript to the taxpayer address on file and they should receive it within five to ten days.