



TEHRANI + VELEZ

# IRS Website

Customer Self Service

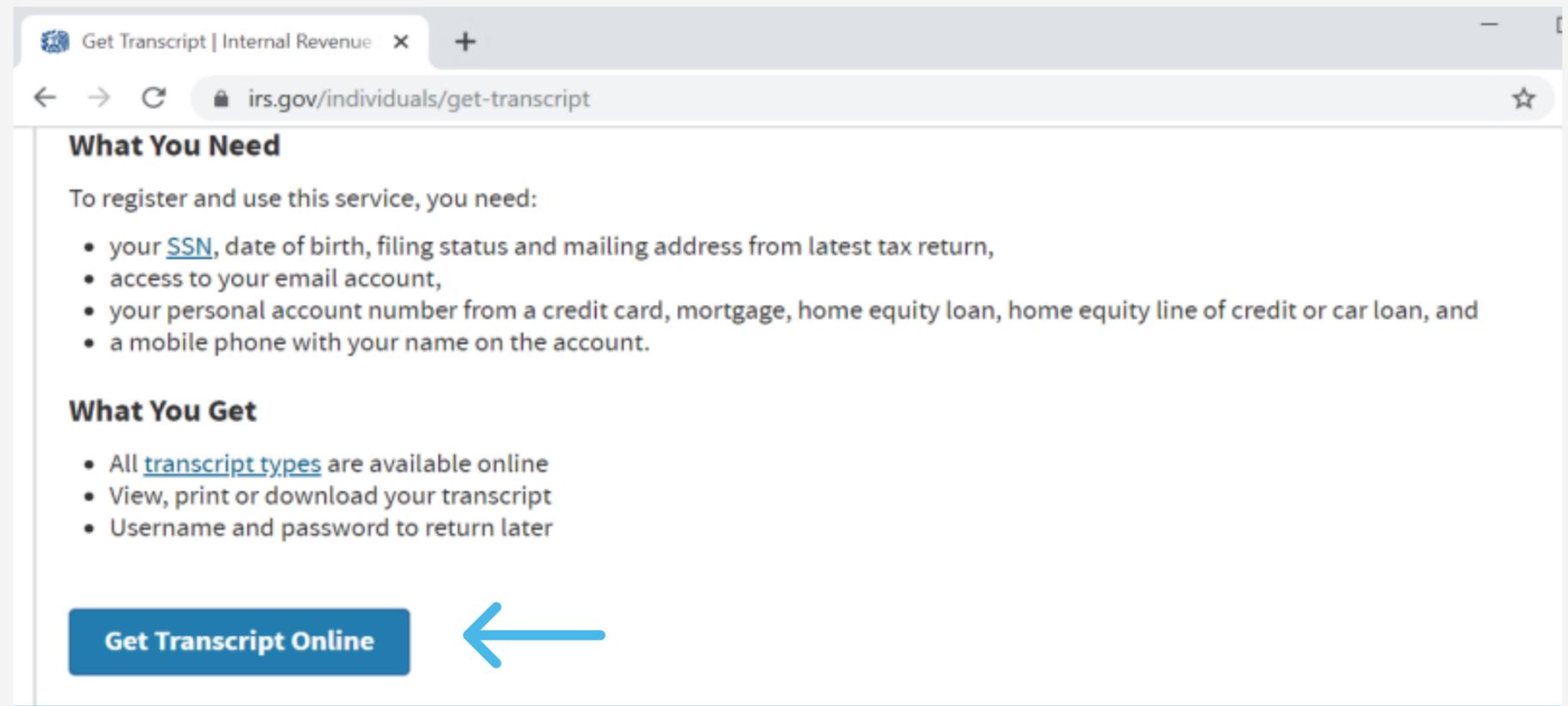


Sign Up  
(Register) or  
Log In

---

# Getting Started

- ✓ Go to the website: <https://www.irs.gov/individuals/get-transcript>
- ✓ Select Get Transcript Online



The screenshot shows a web browser window with the URL [irs.gov/individuals/get-transcript](https://www.irs.gov/individuals/get-transcript). The page content includes:

### What You Need

To register and use this service, you need:

- your [SSN](#), date of birth, filing status and mailing address from latest tax return,
- access to your email account,
- your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- a mobile phone with your name on the account.

### What You Get

- All [transcript types](#) are available online
- View, print or download your transcript
- Username and password to return later

At the bottom of the page, there is a blue button labeled "Get Transcript Online" with a blue arrow pointing to it from the right.

Two choices appear:

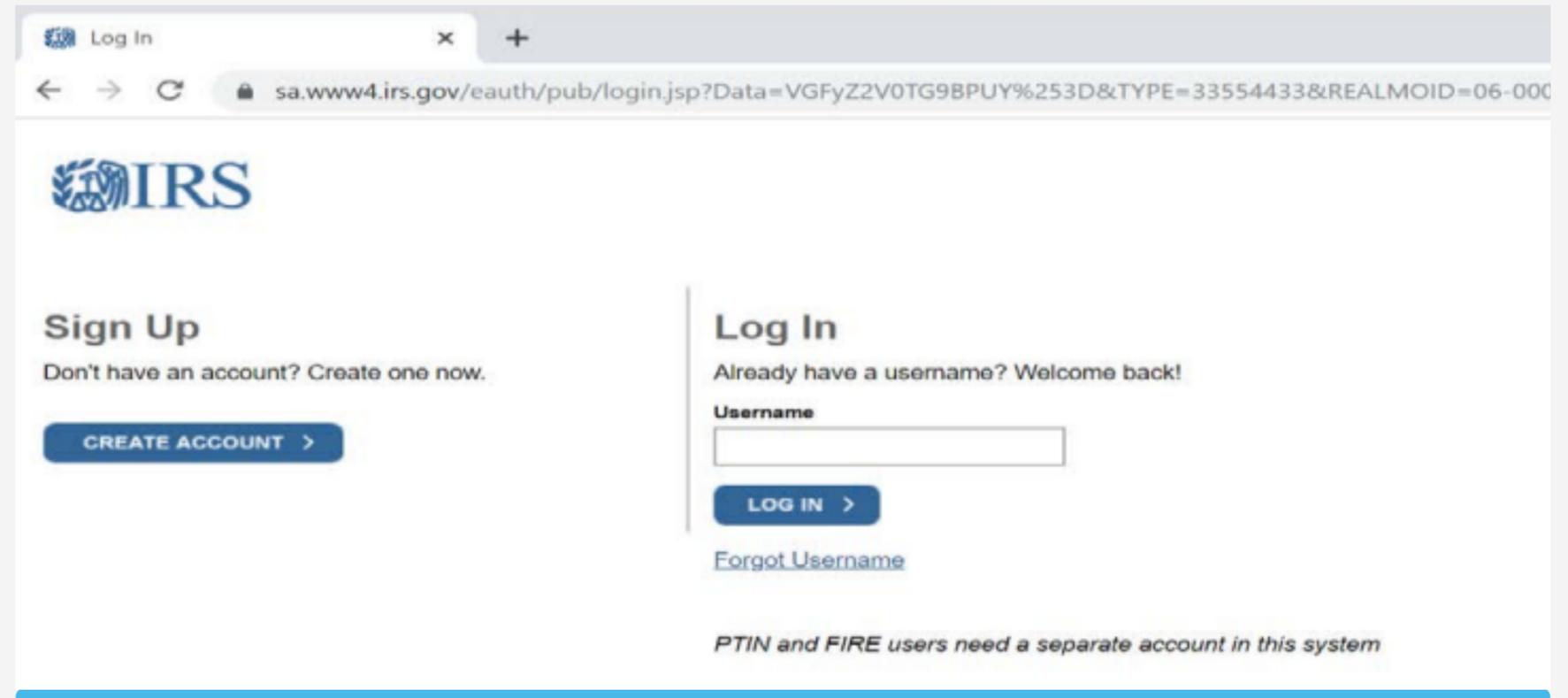
**Sign Up**

(never registered before)  
Select Create Account >  
to begin

or

**Log In**

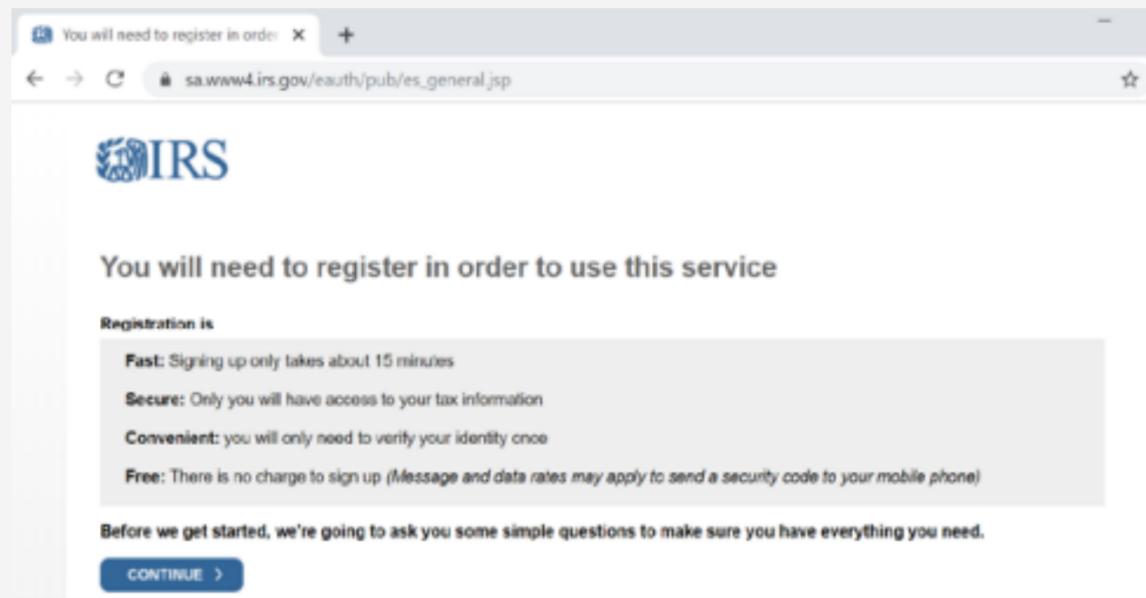
(for previous account users)  
Skip to slide 15 for input  
instructions



# Sign Up Steps

After selecting Create Account:

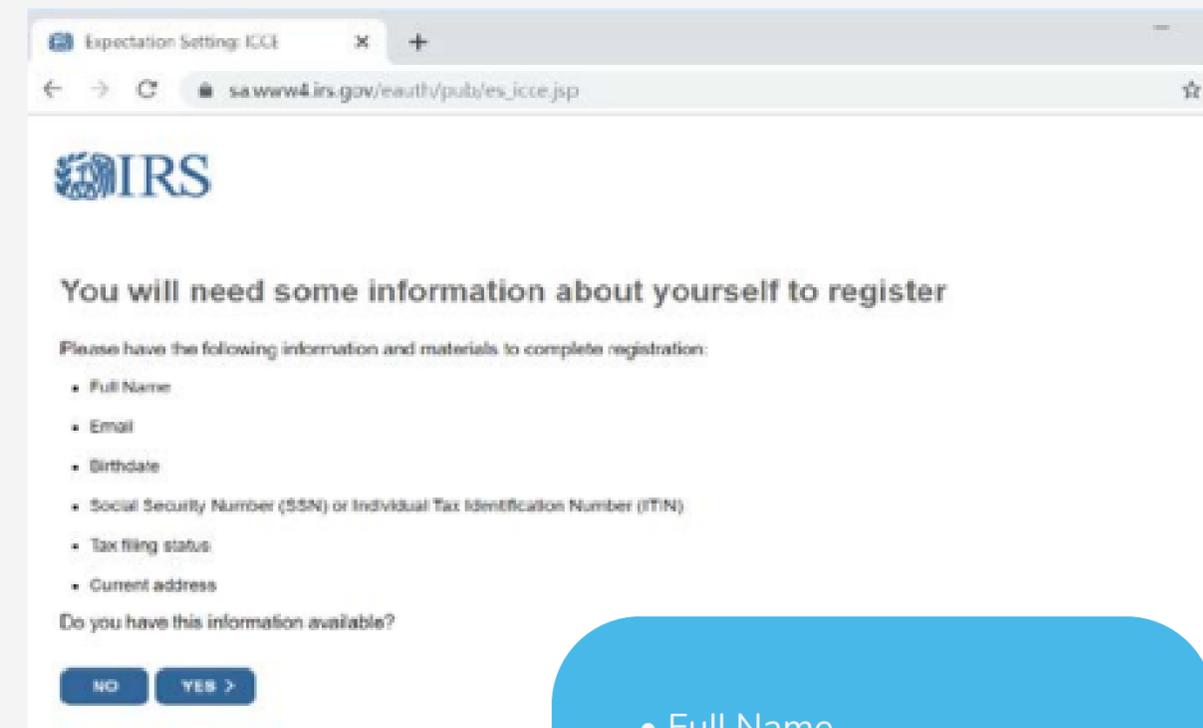
01 Click Continue



02

Make sure you have the required information to register and select

YES



- Full Name
- Email
- Birthdate
- Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
- Tax Filing Status
- Current Address

03

Make sure you have the required financial information to register and select **YES**

Expectation Setting: Financial

sa.www4.irs.gov/eauth/pub/es\_avs.jsp

**IRS**

### 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'.)

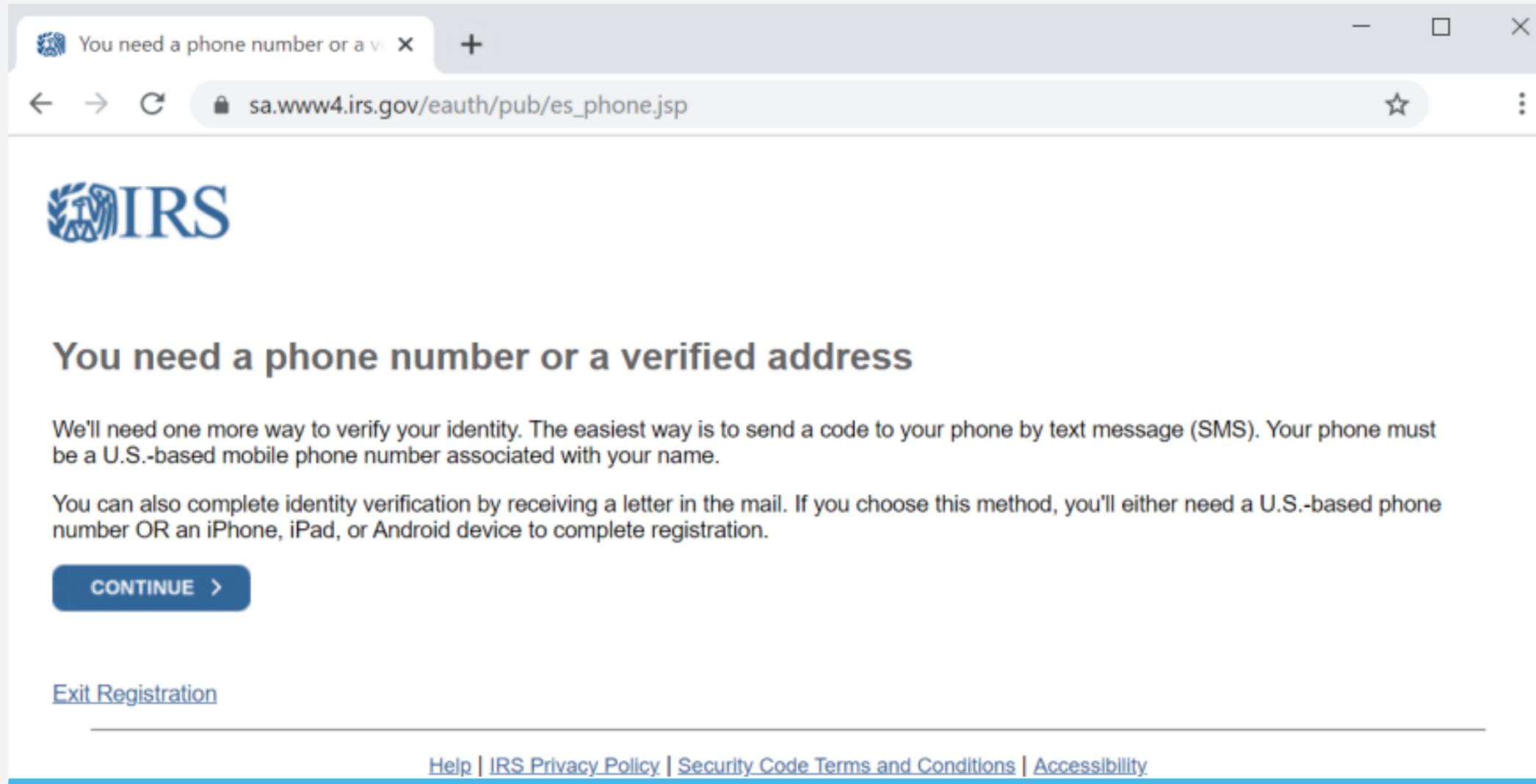
**NO** **YES >**

Account number from ONE of the following:

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

04

Make sure you have your Cell Phone handy, and Select Continue



The screenshot shows a web browser window with the URL `sa.www4.irs.gov/eauth/pub/es_phone.jsp`. The page features the IRS logo at the top left. The main heading is "You need a phone number or a verified address". Below this, there are two paragraphs of text explaining the verification requirements. A blue button labeled "CONTINUE >" is positioned below the text. At the bottom left, there is a link for "Exit Registration". The footer contains links for "Help", "IRS Privacy Policy", "Security Code Terms and Conditions", and "Accessibility".

**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 >](#)

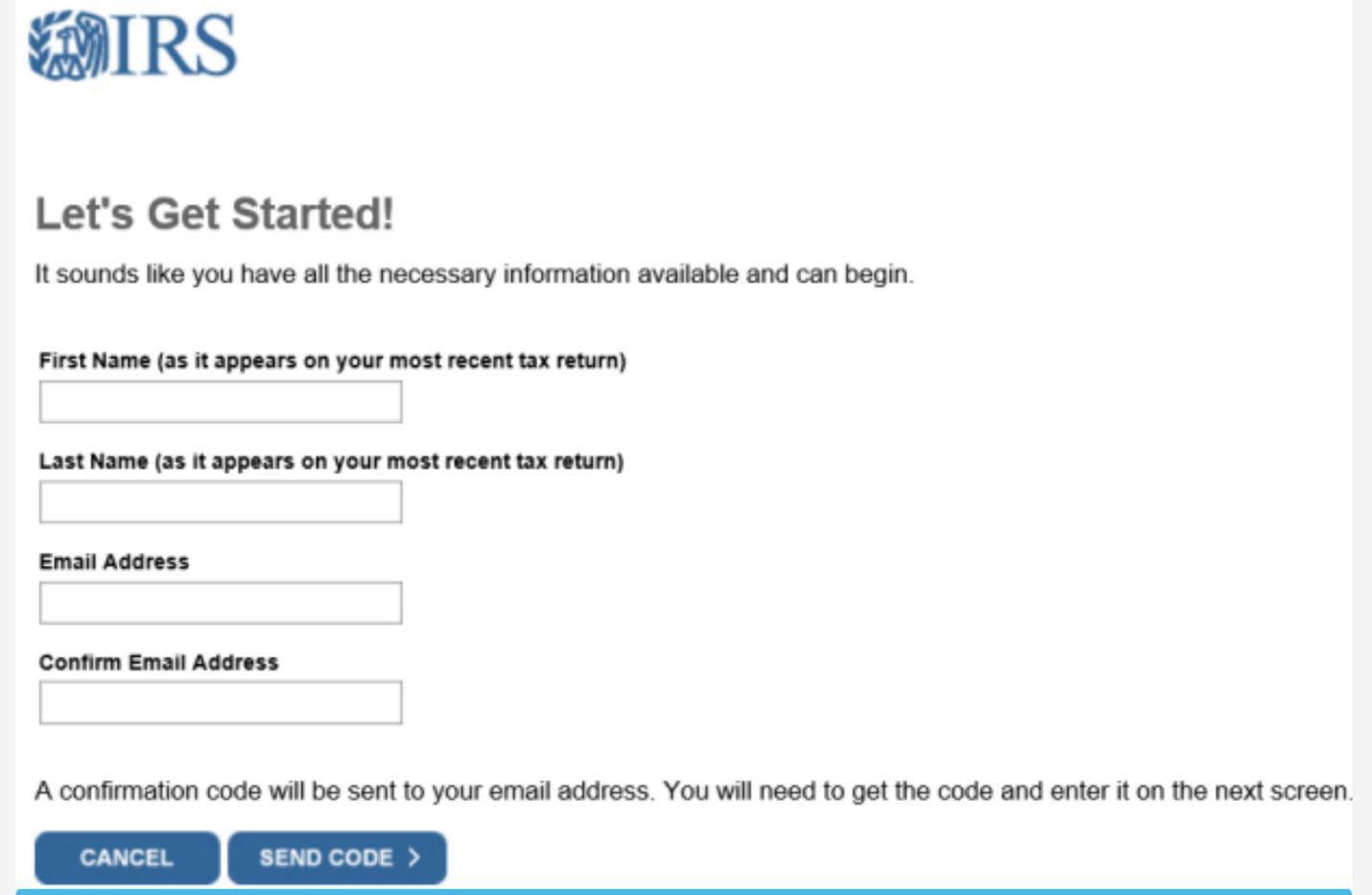
[Exit Registration](#)

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

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

06 Input and confirm your email  
address

07 Select Send Code  
a. A confirmation code will be sent  
to your email address



The screenshot shows the IRS logo at the top left. Below it is the heading "Let's Get Started!" followed by the text "It sounds like you have all the necessary information available and can begin." There are four input fields: "First Name (as it appears on your most recent tax return)", "Last Name (as it appears on your most recent tax return)", "Email Address", and "Confirm Email Address". At the bottom, there are two buttons: "CANCEL" and "SEND CODE >". A blue horizontal bar is at the very bottom of the page.

08

Check your email for the verification code and input it on the IRS website.

Help us verify your identity with s x +

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

IRS

### 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 >**

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

Follow the directions if a confirmation code was not received.

09

Input your Date of Birth, Social Security Number and previous Filing Status (Name flows in automatically)

The screenshot shows a web browser window with the URL `sa.www4.irs.gov/eauth/pub/registration/id_proofing.jsp`. The page features the IRS logo and the heading "Help us verify your identity with some basic information". A disclaimer 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.](#)".

**Personal Information**  
All information should match your latest tax return.

**First Name**  
 [Edit](#)

**Last Name**  
 [Edit](#)

**Date of Birth**  
Month  Day  Year

**Social Security Number (SSN) or [Individual Tax ID Number \(ITIN\)](#)**  
 -  -

**Filing Status**

I have filed a tax return in the past seven years

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

10

Input your address (match your last filed tax return) and select 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

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



11

Answer one of the selected questions and select Continue

Read and answer this section very carefully as it may lock you out of the system if answered incorrectly.



The screenshot shows a web browser window with the URL `sa.www4.irs.gov/eauth/pub/registration/ide_proofing.jsp?`. The page title is "Verify your financial account number". The main heading is "Verify your financial account number". Below the heading, there is a paragraph: "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 six radio button options, each with a corresponding text input field: "Last 8 digits of credit card" (with a note: "(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", and "I don't have a current credit card, student loan, auto loan, home equity loan, or mortgage". At the bottom, there is a paragraph: "By providing financial account information, I authorize the IRS to access my credit report for the purpose of verifying my identity." and a blue "CONTINUE >" button. On the right side, there is a grey box titled "Financial account information" containing text about how the information will be used and a link to "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".

12

Enter your CELL phone number and select Send Message

13

Check your phone and input the 6-digit activation code in the IRS website

The screenshot shows a web browser window with the URL `sa.www4.irs.gov/eauth/pub/registration/id_phone.jsp?actionName=VerifyFinDataProxy`. The page features the IRS logo and the heading "Verify your phone number". Below the heading is a paragraph of text explaining the verification process and a note that landlines and virtual numbers cannot be verified. There is an input field for the mobile phone number and two buttons: "CANCEL" and "SEND MESSAGE >". At the bottom, there are links for "Help", "IRS Privacy Policy", "Security Code Terms and Conditions", and "Accessibility".

The screenshot shows the IRS logo and the heading "We sent an activation code text message to your phone". Below the heading is a paragraph stating that a 6-digit activation code has been sent via text message. There is an input field for the "6-digit activation code" and a "Try again" link. At the bottom, there are two buttons: "CANCEL" and "CONTINUE >". At the very bottom, there are links for "Help", "IRS Privacy Policy", "Security Code Terms and Conditions", and "Accessibility".

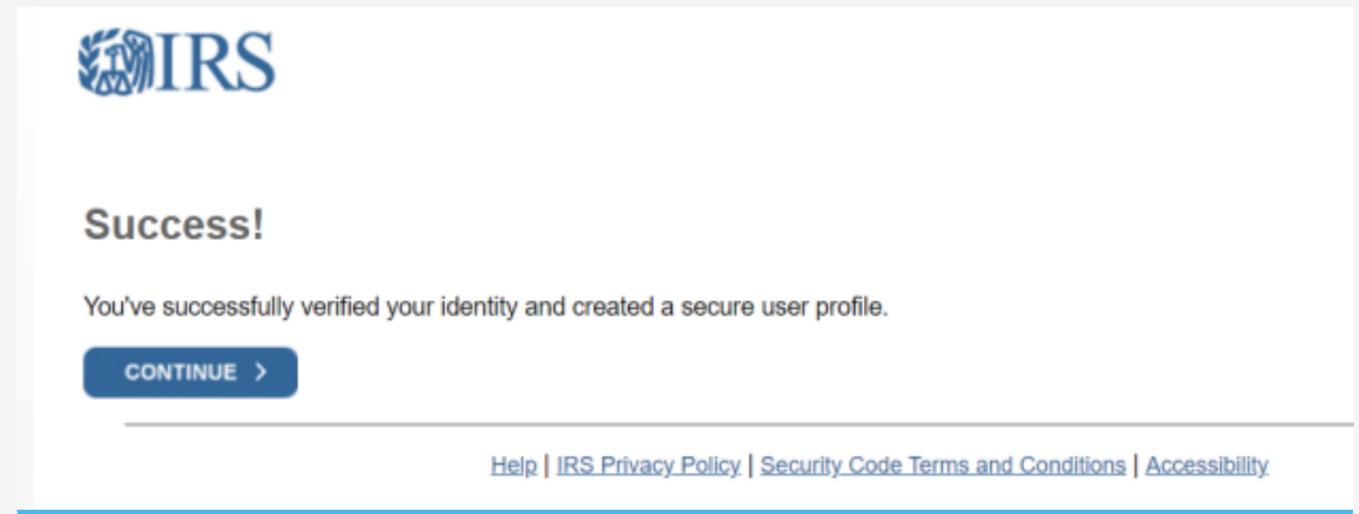
14

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

The screenshot shows a web browser window with the URL `https://pub.registration/profile_create.jsp?actionName=VerifyActivationCodeProxy`. The page title is "Create a Username and Password". It features several input fields: "Username", "Password", "Re-enter Password", and "Email" (with an "Edit" link). A grey box on the right contains instructions: "Enter a username of your choice. The username should be 8-64 characters and cannot be an email address, SSN, or contain a space, or a special character (@#%\*^&). Password Rules: • Between 8 and 32 characters long. • Must contain at least one numeric and one special character (@#%\*^&). • At least one uppercase and at least one lowercase letter. • Matching password must be re-entered." Below these fields are sections for "Choose a Site Phrase" (with a text input) and "Choose a Site Image" (with a selected image of a building and a "Choose Your Site Image" link). At the bottom are "CANCEL" and "CONTINUE >" buttons. A footer contains links for "Help | IRS Privacy Policy | Security Code Terms and Conditions | Accessibility".

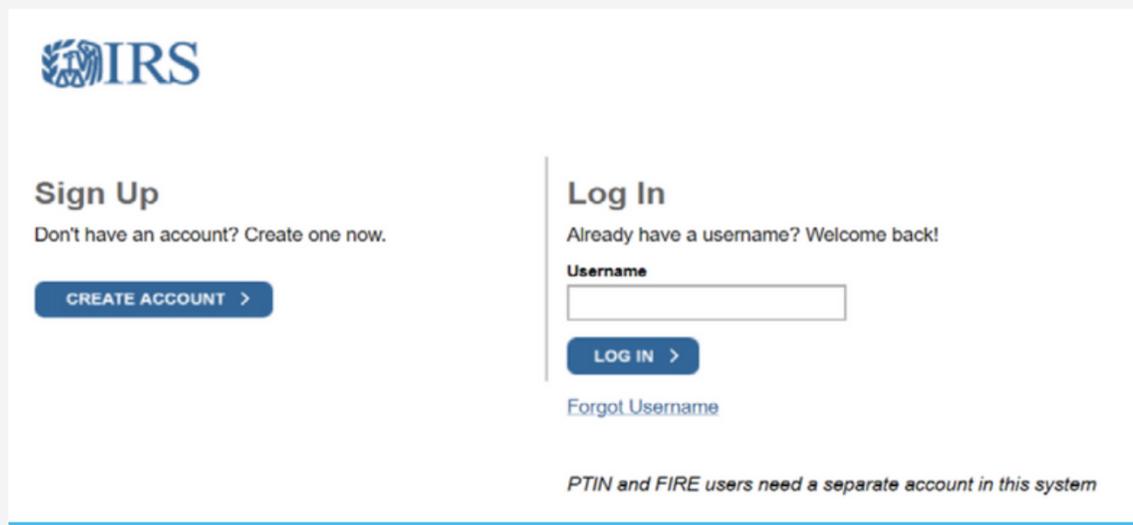
15

Hit Continue



# Log In Steps

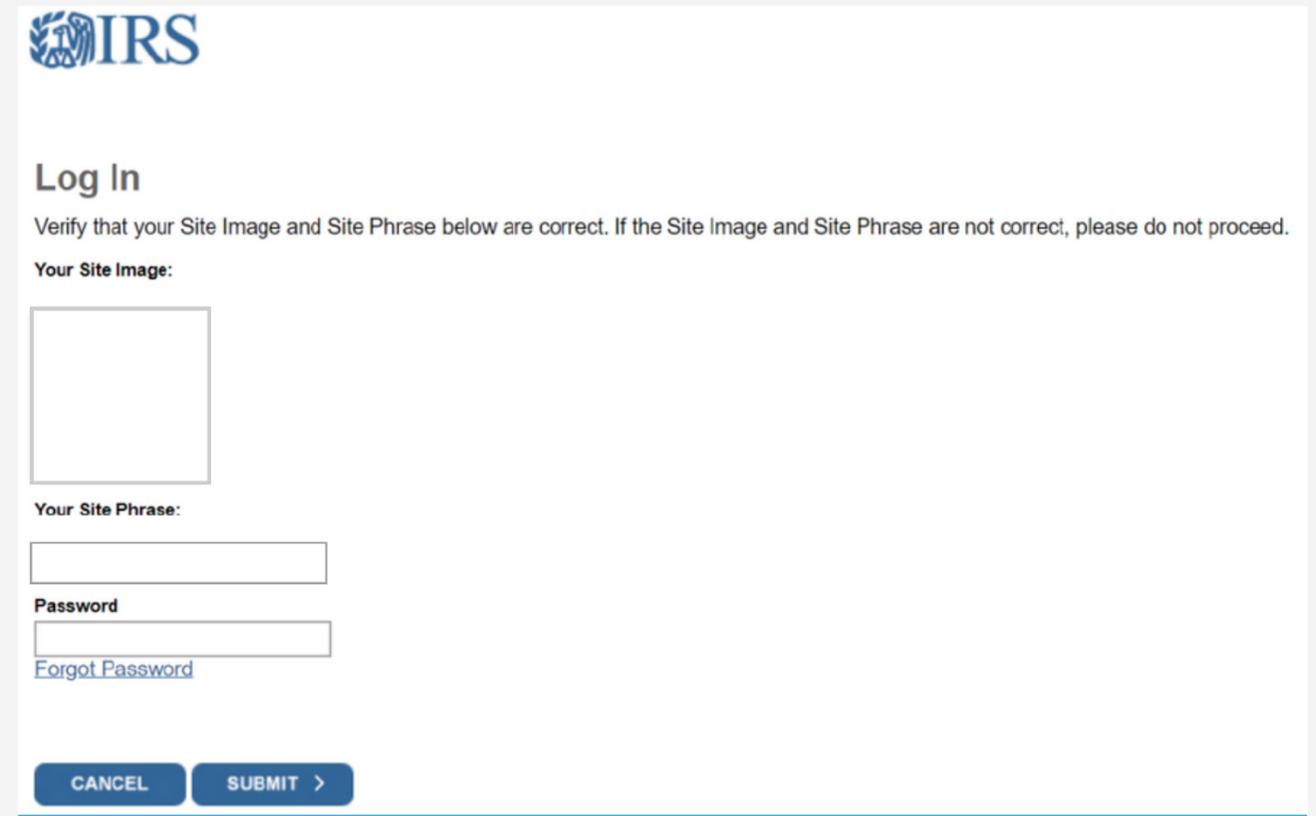
## 01 Input Username



The screenshot shows the IRS login page. On the left, there is a 'Sign Up' section with the text 'Don't have an account? Create one now.' and a 'CREATE ACCOUNT >' button. On the right, there is a 'Log In' section with the text 'Already have a username? Welcome back!' and a 'Username' input field. Below the input field is a 'LOG IN >' button and a link for 'Forgot Username'. At the bottom of the 'Log In' section, there is a note: 'PTIN and FIRE users need a separate account in this system'.

02

Review the Site Image and Site Phrase. If correct, input your Password.



The screenshot shows the IRS login page. At the top left is the IRS logo. Below it is the 'Log In' section. The text reads: '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.' Below this text are two fields: 'Your Site Image:' with a square input field, and 'Your Site Phrase:' with a rectangular input field. Below the 'Your Site Phrase' field is a 'Password' input field and a link for 'Forgot Password'. At the bottom of the form are two buttons: 'CANCEL' and 'SUBMIT >'.

03

Select Submit

04

Check your cell phone (previously registered cell phone), input the 6-digit Security Code

05

Select Continue

**IRS**

**We sent a security code to your phone**

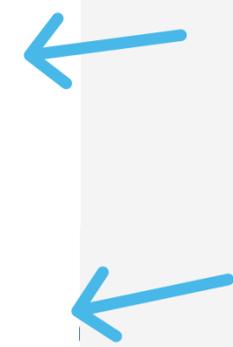
We sent a text message to your phone (ending in 8736). Please enter the code below.

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](#)

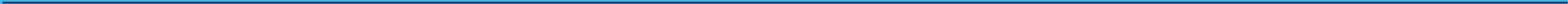


**Follow the prompts if:**

- 1) Resend Security Code
- 2) No longer have access to this phone?
- 3) If you can't receive text messages and need a phone call instead

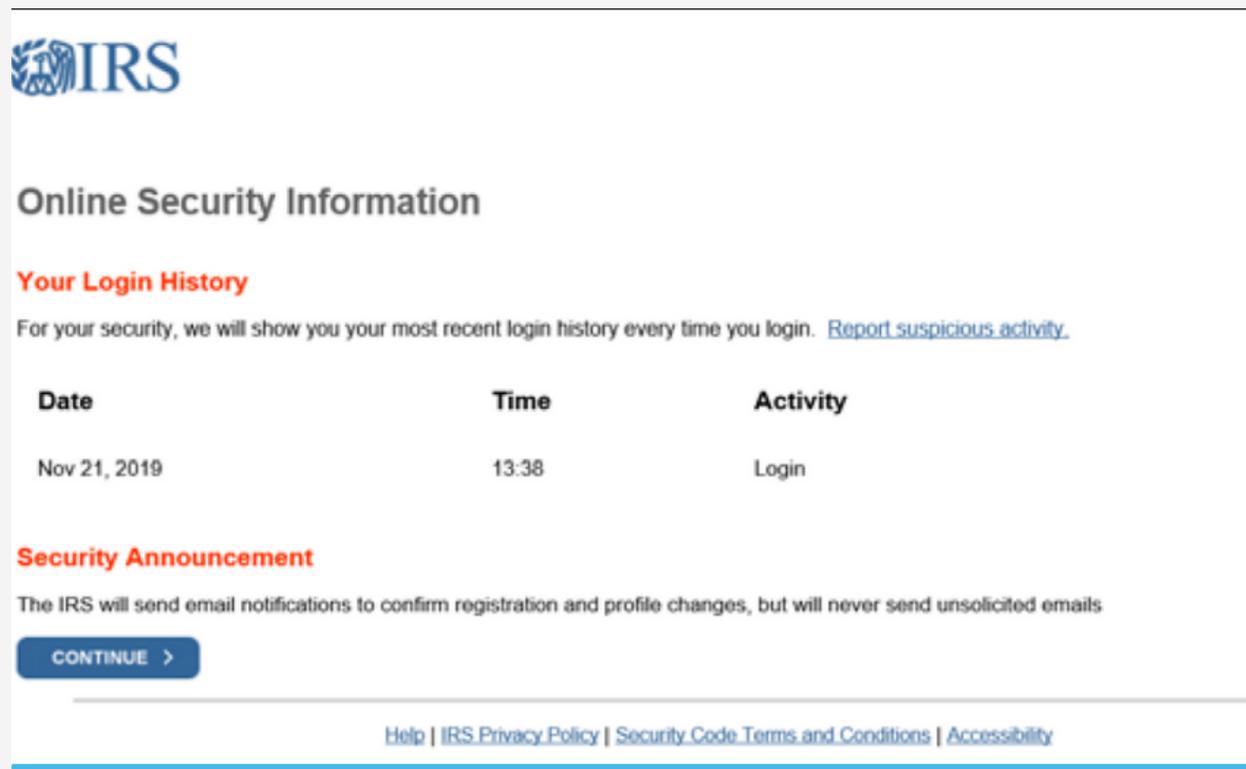


# Pulling Tax Transcripts



# Obtaining Transcripts

01 After Logging In, review the information and select Continue

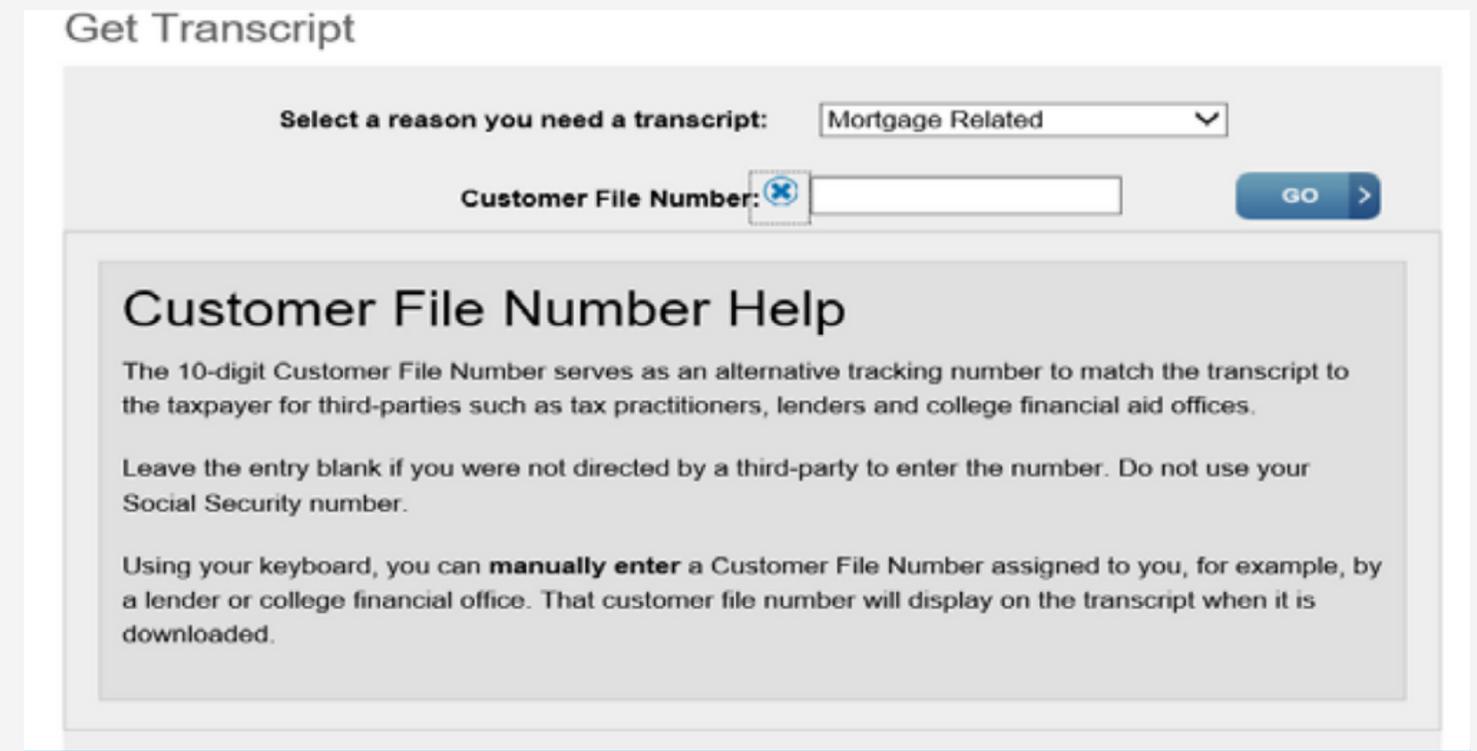


The screenshot shows the IRS Online Security Information page. At the top left is the IRS logo. Below it is the heading "Online Security Information". Underneath is a section titled "Your Login History" with a sub-heading "For your security, we will show you your most recent login history every time you login. [Report suspicious activity.](#)". A table follows with three columns: "Date", "Time", and "Activity". The table contains one row: "Nov 21, 2019", "13:38", and "Login". Below the table is a "Security Announcement" section stating "The IRS will send email notifications to confirm registration and profile changes, but will never send unsolicited emails". At the bottom of this section is a blue button labeled "CONTINUE >". At the very bottom of the page are links for "Help | IRS Privacy Policy | Security Code Terms and Conditions | Accessibility".

Date	Time	Activity
Nov 21, 2019	13:38	Login

02

On the Get Transcript window, select the reason Mortgage Related from the first dropdown and select **GO**



The screenshot shows the "Get Transcript" window. At the top, it says "Select a reason you need a transcript:" followed by a dropdown menu with "Mortgage Related" selected. Below that is a "Customer File Number:" label, a text input field, and a blue "GO >" button. A help box titled "Customer File Number Help" is displayed below the input field. The help text explains that the 10-digit Customer File Number is used for matching transcripts to taxpayers for third parties like tax practitioners, lenders, and college financial aid offices. It also notes that the entry should be blank if not directed by a third party and that the number will be manually entered on the transcript.

a. No Customer File Number is needed

03

Select the Year link under the Record of Account Transcript box, requested by your Loan Processor.

04

Each item will open as a PDF document. Download or save the PDF document to your computer and upload it to your Tehrani & Velez Portal.

05

Repeat steps #3 and #4 above until all transcripts are saved and uploaded.

Below are the transcripts and years available.

Return Transcript	Record of Account Transcript	Account Transcript	Wage & Income Transcript
2018	2018	2018	2018
2017	2017	2017	2017
2016	2016	2016	2016
2015	2015	2015	2015

Show All 

Show All 



Checking Account  
Status / Balance

---

# Checking Account Status/Balance

You can check your Account Status, Payment History, IRS Balance and apply for an IRS Payment Plan from the IRS's

Website:

<https://www.irs.gov/payments/view-your-tax-account>

This uses the same IRS login as noted in the above slides (slides 15-16).

Once logged in you have 6 options:

01

Account Home (Landing Page)

- Overview of the options

02

Account Balance

- Shows your total balance with the IRS
- Clicking into the details will show by year

03

Payment Options

- Make a payment and set up payment plans

04

Payment Activity

- History of payment plans and tax year payments

05

Tax Records

- Quick snapshot of the last form file
- Links to the Tax Records noted above (Slide 19)

06

Message Center

- Recent communication with the IRS (in this portal)



01

Account Home

02

Account Balance

03

Payment Options

04

Payment Activity

05

Tax Records

06

Message Center

## Welcome

### **i** Important Message from the IRS

The IRS is taking steps to help taxpayers affected by COVID-19. See our [Coronavirus Tax Relief](#) page for more information.

### Account Status

Total Amount Owed  
as of November 24, 2020:

\$

[View Balance Details](#)

### Records

[View Tax Records](#) for:

- Key information from your most recent tax return
- Downloadable tax records

[View Message Center](#) for correspondence from the IRS

### Payments

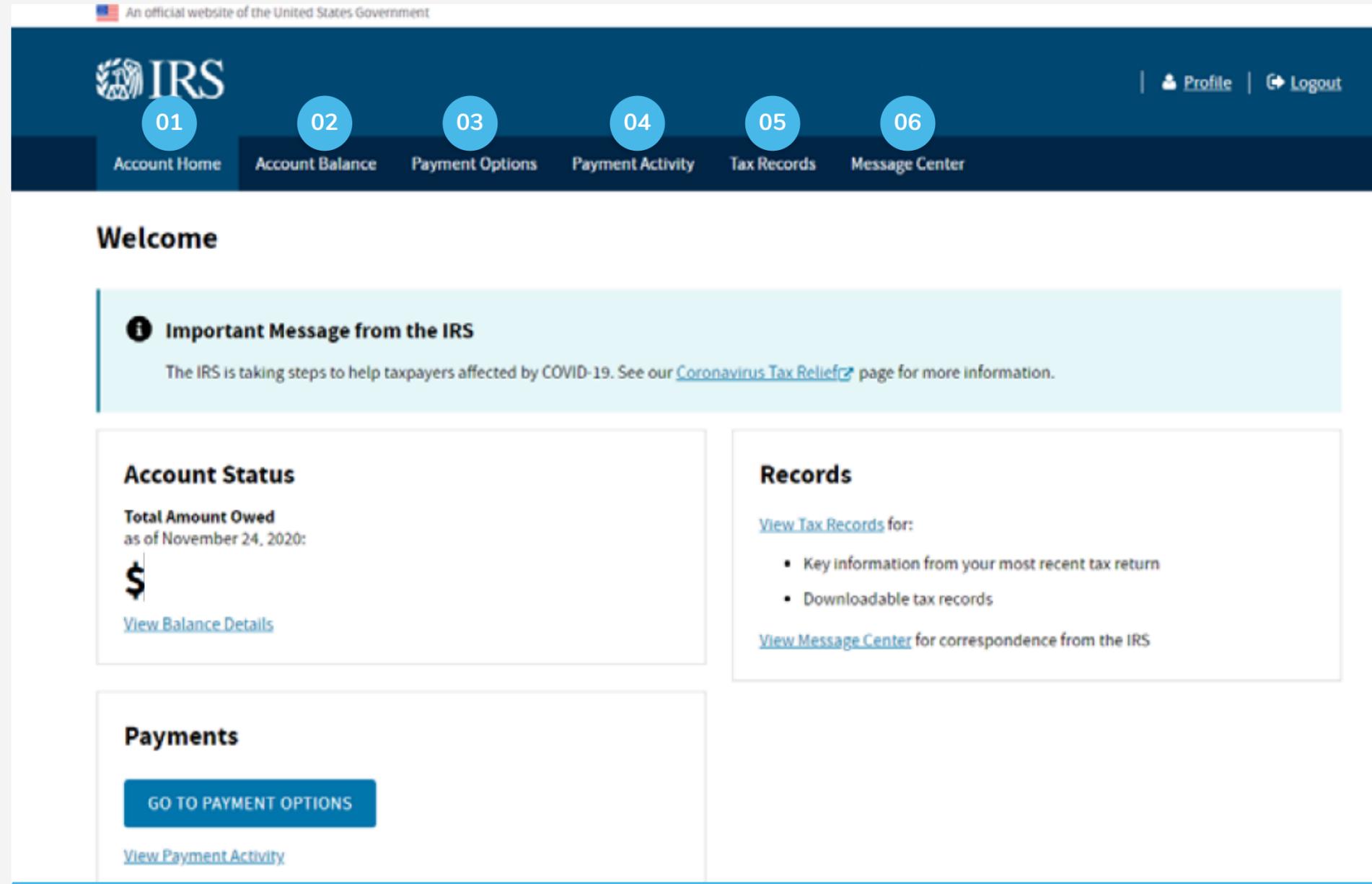
GO TO PAYMENT OPTIONS

[View Payment Activity](#)

01

# Account Home (Landing Page)

- Overview of the options



02

# Account Balance

- Shows your total balance with the IRS
- Clicking into the details will show by year

An official website of the United States Government

IRS

Profile | Logout

Account Home **Account Balance** Payment Options Payment Activity Tax Records Message Center

Account Home / Account Balance

## Account Balance

### Total Amount Owed

\$

The information provided is based on our current data.  
The numbers here may not reflect:

- Recently filed or processing returns
- Pending payments or adjustments
- 

[GO TO PAYMENT OPTIONS](#)

[Frequently Asked Questions About Balances](#)

### Details By Year

Tax Year	You Owe
+ 2020	INFO ⓘ
2019	
2018	
2017	
2016	

Total Amount Owed

03

# Payment Options

- Make a payment and set up payment plans

03

Account Home Account Balance **Payment Options** Payment Activity Tax Records Message Center

Account Home / Payment Options

## Payment Options

### Pay Now

Make a payment from your bank account or through any of the methods listed below.

**Have this Information Handy**

If paying a balance, you will need the Reason for Payment, Tax Type, and Amount Owed from your What You Owe table.

To verify your identity, you will need from a tax return within the last six years:

- Tax return details: tax year, filing status
- Personal information: name, address, date of birth, Social Security Number or Individual Taxpayer Identification Number

#### Pay by Bank Account

Pay from your bank account by using IRS Direct Pay, a separate and secure IRS online system.

[GO TO IRS DIRECT PAY](#)

#### Pay by Debit or Credit Card

Fees apply when paying by card. You will pay on the separate and secure website of an IRS-approved payment processor.

[GO TO CARD OPTIONS](#)

#### Pay by Mail

You may [pay by check or money order](#).

### Create a Payment Plan

If you can't pay now and need more time to pay, payment plan options may be available to you.

Apply for the payment plan that best fits your needs.

- A **Short-term payment plan** allows you up to 120 days to pay in full.
- A **Long-term payment plan (installment agreement)** allows you to make monthly payments on your balance.

For more information about how to create a payment plan, see [answers to common questions](#).

**Create a Payment Plan Now**

[GO TO PAYMENT PLANS](#)

IRS [Privacy Policy](#) [Accessibility](#)

04

# Payment Activity

- History of payment plans and tax year payments

Account Home Account Balance Payment Options **Payment Activity** Tax Records Message Center

Account Home / Payment Activity

## Payment Activity

**Scheduled Payments**

There are no scheduled payments at this time.

**Pending Payments**

Please note: Payments by check or money order are not included in the list.

There are no pending payments at this time.

**Processed Payments**

View payments made in the past 5 years. Note that payments may take 1 to 3 weeks to be shown here.  
This list does not include tax withholding.

Date	Tax Year	Type	Amount
Jul 15, 2020	2019	Payment	

IRS Privacy Policy Accessibility

05

## Tax Records

- Quick snapshot of the last form file
- Links to the Tax Records noted above (Slide 19)

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IRS

05

Profile Logout

Account Home Account Balance Payment Options Payment Activity Tax Records Message Center

Account Home / Tax Records

### Tax Records

**2019 Summary**  
View key information from your most recent tax return as originally filed.

Form Filed
Filing Status
Adjusted Gross Income

**Get Transcripts Online**  
View, print or download information from your tax returns, account transcripts, W-2s, 1099s, and more.

[GET TRANSCRIPT](#)

Takes you to the section on pulling transcripts

IRS

Privacy Policy Accessibility

06

# Message Center

- Recent communication with the IRS (in this portal)

The screenshot shows the IRS Message Center interface. At the top, there is a dark blue header with the IRS logo on the left and 'Profile' and 'Logout' links on the right. Below the header is a navigation bar with several menu items: 'Account Home', 'Account Balance', 'Payment Options', 'Payment Activity', 'Tax Records', and 'Message Center'. The 'Message Center' item is highlighted with a blue circle containing the number '06'. Below the navigation bar, the breadcrumb 'Account Home / Message Center' is visible. The main heading 'Message Center' is displayed in a large, bold font. Underneath, there is a section titled 'IRS Notices' with the text 'Only certain IRS notices are available online at this time.' and a large, empty rectangular box. At the bottom of the page, there is a footer with the IRS logo on the left and links for 'Privacy Policy' and 'Accessibility' on the right.