INTERNAL REVENUE SERVICE

IRS ⊛ Fact Sheet

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How to Register for Get Transcript Online Using New Authentication Process

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The IRS recently enhanced its e-authentication procedures required to register and use certain self-help tools on IRS.gov. This is a more rigorous e-authentication process than IRS has used in the past. It is in line with federal information security standards and the latest industry practices used by major financial institutions as well as many other large businesses.

We continue to support multiple options for those taxpayers who may be unable to access online features, and will continue to look for ways to expand options for all taxpayers.

The new e-authentication procedures currently are being applied to Get Transcript Online. The new procedures are scheduled to be applied to some other tools, such as Get an Identity Protection PIN, later this year.

Here's what new users need to get started:

- A readily available email address;
- Your Social Security number or Individual Tax Identification Number;
- Your filing status and address from your last-filed tax return;
- Access to certain account numbers for either:
    - credit card, or
    - home mortgage loan, or
    - home equity (second mortgage) loan, or
    - home equity line of credit (HELOC), or
    - car loan
- A readily available mobile phone. Only U.S-based mobile phones may be used. Your name must be associated with the mobile phone account. Landlines, Skype, Google Voice or similar virtual phones as well as phones associated with pay-as-you-go plans cannot be used;
- If you have a "credit freeze" on your credit records through Equifax, it must be temporarily lifted before you can successfully complete this process.

Because this process involves verification using financial records, there may be a "soft notice" placed on your credit report. This notice does not affect your credit score.

To securely access Get Transcript Online, first-time users must:

- Submit their name and email address to receive a confirmation code;
- Enter the emailed confirmation code;
- Provide their SSN, date of birth, filing status and address on the last filed tax return;
- Provide some financial account information for verification such as the last eight digits of their credit card number or car loan number or home mortgage account number or home equity (second mortgage) loan number;

- Enter a mobile phone number to receive a six-digit activation code via text message;
- Enter the activation code;
- Create username and password, create a site phrase and select a site image.

Returning taxpayers who have not completed the new secure access process:

- Log in with an existing username and password;
- Submit financial account information for verification, for example, the last eight digits of a credit card number or car loan number or home mortgage account number or home equity (second mortgage) loan account number;
- Submit a mobile phone number to receive an activation code via text;
- Enter the activation code.

Returning taxpayers who have completed the new secure access process:

- Log in with an existing username and password;
- Receive a security code text via mobile phone provided with account set up;
- Enter the security code into secure access.

If at any point, you cannot validate your identity – for example, you cannot provide financial verification information or you lack access to a mobile phone – you may use Get Transcript by Mail.

Get Transcript by Mail allows you to go online and select the mail option. The transcript will be mailed to the address of record and will be delivered within five to 10 days.

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