

IRS Tax Transcript - Assistance Guide

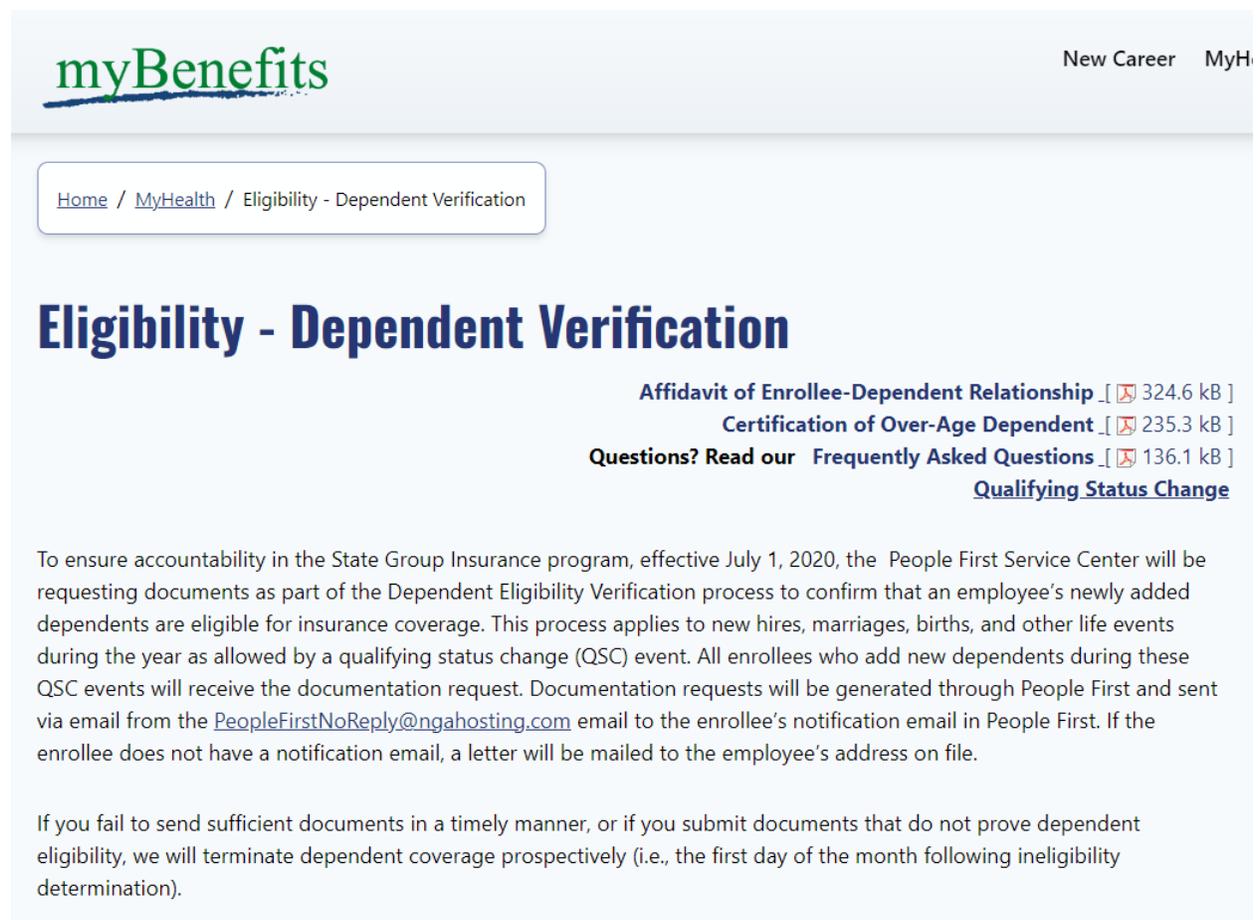
Dependent Eligibility Verification Information for **Spouse**:

Tax transcript is a required document if you have been married for more than twelve months and wish to add your spouse to any of the benefit plans through the State Group Insurance Program (SGIP).

This guide will assist you with the process to create an ID.me login for the IRS website and download your tax transcript. If you have an ID.me login, please skip to page 9.

From the myBenefits state website, please select the below link:

My benefits state link: https://www.mybenefits.myflorida.com/myhealth/eligibility_-_dependent_verification



The screenshot shows the myBenefits website interface. At the top left is the myBenefits logo. At the top right are links for "New Career" and "MyH". Below the logo is a breadcrumb trail: "Home / MyHealth / Eligibility - Dependent Verification". The main heading is "Eligibility - Dependent Verification". Below the heading are four links: "Affidavit of Enrollee-Dependent Relationship" (324.6 kB), "Certification of Over-Age Dependent" (235.3 kB), "Questions? Read our Frequently Asked Questions" (136.1 kB), and "Qualifying Status Change". A paragraph of text explains the documentation request process for dependent eligibility verification, effective July 1, 2020. It states that the People First Service Center will request documents to confirm newly added dependents are eligible for insurance coverage. This process applies to new hires, marriages, births, and other life events during the year as allowed by a qualifying status change (QSC) event. All enrollees who add new dependents during these QSC events will receive the documentation request. Documentation requests will be generated through People First and sent via email from the PeopleFirstNoReply@ngahosting.com email to the enrollee's notification email in People First. If the enrollee does not have a notification email, a letter will be mailed to the employee's address on file. A final paragraph states that if sufficient documents are not sent in a timely manner or if submitted documents do not prove dependent eligibility, dependent coverage will be terminated prospectively (i.e., the first day of the month following ineligibility determination).

Scroll down to the FOR SPOUSE section and select the IRS link for the transcript (see below):

FOR SPOUSE:

- **Marriage Certificate** - If married **less than 12 months** and you and your spouse have not filed a federal income tax return as married, you will need to submit a copy of your government-issued marriage certificate, **OR**
- **Tax Transcript** - If you and your spouse have been married for **12 or more months**, a Tax Return Transcript of your most recently filed federal income tax return showing you filed as married, either jointly or separately. The tax return transcript is the only official record of the tax return that you filed with the IRS. A copy of your tax return (Form 1040 or e-file documentation) will **not** be sufficient. The Form 1040 can be falsified and is not an official record of what was filed with the IRS. You can request a copy of your transcript from the IRS at www.irs.gov/individuals/get-transcript or by calling the IRS at 800-908-9946. Please submit **ONLY** the first page, showing yours and your spouse's names or the last four digits of their Social Security number and tax filing period. All other information should be marked out. If you are unable to obtain your transcript, please contact the Division of State Group Insurance.
- **Marriage Affidavit** (*must be notarized*) – If you were married in a foreign country or your spouse is a foreign national and does not have a valid social security number, you will need to submit a government issued marriage certificate that shows the date of marriage along with your marriage affidavit.

The IRS link connects you to the IRS website. Select to **Sign in to your online account**:

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

Home / [File](#) / [Individuals](#) / [Your information](#) / Get your tax records and transcripts

Get your tax records and transcripts

English | [Español](#) | [中文\(简体\)](#) | [中文\(繁體\)](#) | [한국어](#) | [Русский](#) | [Tiếng Việt](#) | [Kreyòl ayisyen](#)

Individuals

- Who should file
- How to file
- When to file
- Where to file
- Amend return
- Your information
- Tax record (transcript)**
- Income Verification Express Service

You can access your personal tax records online or by mail, including transcripts of past tax returns, tax account information, wage and income statements, and verification of non-filing letters.

If you need a transcript for your business, find out how to [get a business tax transcript](#).

Access tax records and transcripts in your Individual Online Account

You can view your tax records in your [Individual Online Account](#). This is the fastest, easiest way to:

- View, print or download your transcripts
- Find out how much you owe
- Look at your payment history
- See your prior year adjusted gross income (AGI)
- View other tax records

Sign in to your online account

Note: The method you used to file your tax return (e-file or paper) and whether you had a balance due affects your [current year transcript availability](#).

You will need to sign in with your ID.me account or select to **Create an account**. If you already have an account, skip to page 9.

Sign In or Create a New Account

You only need one ID.me account

If you already have an account, don't create a new one. You can use the same ID.me account to sign in to different IRS online services.

IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your privacy.

ID.me is an account created, maintained, and secured by a technology provider.

If you don't have an ID.me account, you must create a new account.

Sign in with an existing account

Sign in with **ID.me**

OR

Create a new account

ID.me Create an account

Please enter your email and create a password. Once complete, select **Create account** button.



Create an ID.me account

Multiple ID.me accounts are not allowed.
[If you have an ID.me account, use it to sign in.](#)

Need to use ID.me for work?
[Follow these steps.](#)

* Indicates a required field

Email *

Password *

Confirm Password *

- Remember me**
For your security, select only on your devices.
- I accept the ID.me [Terms of Service](#) and [Privacy Policy](#) *

Create account

Read the information and select **Continue**.



CONTINUING TO THE INTERNAL REVENUE SERVICE

To protect your identity and information from fraudulent actors, your authentication and transaction-related data (the information related to your ID.me account and identity verification) will be shared with the IRS. This helps ensure that it is really you interacting with the website and not someone pretending to be you.

This information includes transaction-related data like the following:

- Prior sign-ins using your ID.me account (but the names of the websites you access would not be disclosed)
- Multi-factor authentication methods (e.g., text message or push notification)
- The status of your verification (e.g., what steps you have or have not completed; partially entered information)

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

Continue

A verification email will be sent to the email you used to create the account. Open the email, click the link and follow the directions. Enter the confirmation code as requested and click to **Confirm**.

Click the link in our email

Check your inbox for an email from hello@id.me and click the link inside to confirm your email address.

If you do not receive an email within 10 minutes, check your spam folder and verify it hasn't been blocked.

[Why do I need to confirm my email?](#)

OR

Enter the 6-digit code from the email

Confirmation Code

Confirm code

Didn't receive the email?

[Resend my verification](#)

Select a multi-factor authentication option. Most common is the Text Message or Phone Call option.

SECURE YOUR ACCOUNT

1 — 2 — 3

Choose a multi-factor authentication (MFA) option

With MFA, even if someone guesses your password, they won't be able to sign in as you.

- Text Message or Phone Call**
Get a 6-digit code by text message or phone call.
- Push Notification**
Approve sign-ins via push notifications sent to the **ID.me Authenticator** mobile app.
- Code Generator Application**
Generate verification codes via code generator apps like **ID.me Authenticator**.
- Security Key**
Use a physical security key (insert or tap) with your device.
- NFC-Enabled Mobile Security Key**
Tap a YubiKey™ security key to your phone using the **ID.me Authenticator** mobile app.

If you selected the text message or phone call option, you would then select to receive the authentication code by text or phone call. Enter the phone number, click **Continue**.

ID.me + 

SECURE YOUR ACCOUNT

1 — 2 — 3

Receive a code by phone

Please use a phone number you can access whenever you plan to sign in.

Text me **Call me**

Phone Number

THE NUMBER PROVIDED WILL ONLY BE USED FOR ACCOUNT SECURITY. MESSAGE AND DATA RATES MAY APPLY.

[Go back](#)

Enter the code you receive and select **Continue**.

ID.me + 

SECURE YOUR ACCOUNT

1 — 2 — **3**

Confirm your phone number

Please pick up the phone and follow the instructions to receive your 6-digit code.

Enter the 6-digit code *

Didn't receive it? [Resend my verification code](#)

[Go back](#) **Continue**

Select **Continue**.

ID.me + 

YOUR ACCOUNT IS NOW SECURE

Your phone number can now be used for multi-factor authentication.



Visit [ID.me My Account](#) to view and manage multi-factor authentication settings.

Recovery code

A recovery code can be used in the event you lose access to your multi-factor authentication device.

Generate recovery code

Continue

You will need to verify your identity. There are two options, self-service or schedule a video call. You will need to have your driver's license/picture ID available to take a picture for submittal on the self-service portal.



VERIFYING IS FAST AND EASY

Choose how to verify your identity from the options below

Self-Service
Takes 5-10 minutes
Upload a driver's license or state ID, passport or passport card, and capture a selfie.

Video Call
Takes 10 - 15 minutes
Upload a driver's license, state ID, passport, or passport card and join a quick video call.

[Continue](#)

[I don't have a driver's license, state ID, passport, or passport card.](#)

Please read the consent. You will need to select the acknowledgement and select **Continue**.

Consent for ID.me to collect Biometric Data and Sensitive Personal Information

CONSENT FOR ID.ME TO COLLECT BIOMETRIC INFORMATION AND SENSITIVE PERSONAL INFORMATION

In the event of any discrepancy between a non-English version of this document and the English version of this document, the English version shall prevail in all respects.

BIOMETRIC INFORMATION PRIVACY STATEMENT

ID.me will not sell, rent, or trade your Biometric Information, and after verification you may request we delete your Biometric Information. Your Biometric Information will only be used by ID.me to verify your identity in accordance with the guidelines published by the National Institute for Standards and Technology or as required for the prevention of fraud. ID.me will transfer your Biometric Information to our third party partners only when required by a subpoena, warrant, or other court ordered legal action.

Notice and Consent

This Notice and Consent for the collection of Biometric Information, Personal Information and Sensitive Personal Information ("Consent") describes how ID.me

I acknowledge that I have received, read, and agreed to these terms

[Continue](#)

[Cancel](#)

The process will then transition to your cell phone (unless you are completing the entire process from your cell phone). Enter your cell phone number.

ID.me + IRS

VERIFY YOUR IDENTITY

1 — 2 — 3 — 4 — 5

Take photos of your identity document

Enter a mobile phone number, then we'll text you a link to take photos of your identity document.

Identity Document

Driver's license or state ID [Change document](#)

Mobile Phone Number *

Your smartphone must have a camera and a web browser.

By entering your phone number, you agree to receive notifications through text message or voice calls during sign-in attempts in order to protect your account.

You will need to enter your SSN and select **Continue**.

ID.me + IRS

VERIFY YOUR IDENTITY

1 — 2 — 3 — 4 — 5

Enter your Social Security number

Social Security Number (#####) *

The Social Security number is used as a unique identifier to confirm identity. This will not affect your credit score.

[Back](#) [Continue](#)

[I don't have a Social Security Number](#)

As part of the verification process, review the AUTHORIZE THE INTERNAL REVENUE SERVICE screen. Select **Allow**.

ID.me + **IRS**

AUTHORIZE THE INTERNAL REVENUE SERVICE

Before we send you back to **The Internal Revenue Service**, we need your permission to share your verified identity information.

Please note that only information obtained from the verification process will be shared.

The Internal Revenue Service will receive:

- ✓ First Name
- ✓ Middle Name
- ✓ Last Name
- ✓ Email
- ✓ SSN
- ✓ Birth Date
- ✓ Phone
- ✓ Street
- ✓ City
- ✓ State
- ✓ Postal Code

You can remove this access at any time by changing your ID.me account settings.

Allow

[Deny](#)

The process will continue by asking you to upload or take a picture of the front and back of your picture ID. The next step will access your phone camera for a selfie of your face to match to the picture ID. You will hold the phone close to your face while the camera flashes colors and then processes. This may take a couple times. When successful, you will be routed to log onto the IRS website with the email and password you set up.

Once logged into the IRS website, follow the below process for your tax transcript. Select: Records and Status and then Tax Records from the drop down menu:

IRS KIMBERLY MCCAREY English Profile Help

[Account Home](#) [Account Balance](#) [Payments](#) [Records and Status](#) [Notices and Letters](#) [Forms](#) [Authorizations](#)

Welcome [redacted]

Account Status

Total Amount Owed
as of September 17, 2024:
\$ [redacted]
[View Balance Details](#)

Payments

MAKE A PAYMENT
[View Payment Options](#)
[View Payment Activity](#)

Notifications

[Refund Status Now Available](#)
Check your refund status for up to the three most recent tax years.

[Turn On Email Notifications](#)
Sign up to receive email notifications when the IRS issues new notices for your account.

[Go Paperless for Certain IRS Notices](#)
Set your profile preferences to receive IRS notices online.

Records and Status

[View Tax Records](#) for:

- Key information from your most recent tax return
- Downloadable transcripts
- Tax Compliance Report available to check if you filed and paid all your taxes

View Status for:

- Current or past [audits](#)
- [Refund](#) for the 3 most recent years

[View Notices and Letters](#) for correspondence from the IRS



Account Home Account Balance Payments **Records and Status** No

Tax Records
View key tax filing information

Audit Status
View current audit status or review past audits

Account Home / Tax records

Tax records

[2023 Return Summary](#)

[Economic Impact Payment Information](#)

Scroll down on this webpage and select **View your transcripts**:

Transcripts

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

[View your transcripts](#)

Under the Return Transcripts section, select the 2023 Return Transcript PDF or most recent you have available.

Account Transcripts

These transcripts show changes you or the IRS made after the original return was filed, such as making estimated tax payments or filing an amended return.

Available transcripts

- [2023 Account Transcript \[PDF\]](#)
- [2022 Account Transcript \[PDF\]](#)
- [2021 Account Transcript \[PDF\]](#)
- [2020 Account Transcript \[PDF\]](#)

[Show more transcripts](#)

Return Transcripts

These transcripts show most line items from your Form 1040-series tax return as it was originally filed, including associated forms and schedules. Lending institutions offering mortgages often accept return transcripts.

Available transcripts

- [2023 Return Transcript \[PDF\]](#)
- [2022 Return Transcript \[PDF\]](#)
- [2021 Return Transcript \[PDF\]](#)
- [2020 Return Transcript \[PDF\]](#)

Wage & Income Transcripts

These transcripts show data from information returns, such as W-2s, 1098s, and 1099s reported to the IRS. The transcript may not be complete until all earnings are reported.

Available transcripts

- [2023 Wage & Income Transcript \[PDF\]](#)
- [2022 Wage & Income Transcript \[PDF\]](#)
- [2021 Wage & Income Transcript \[PDF\]](#)
- [2020 Wage & Income Transcript \[PDF\]](#)

[Show more transcripts](#)

Record of Account Transcripts

These transcripts combine the information from return and account transcripts.

Available transcripts

- [2023 Record of Account Transcript \[PDF\]](#)
- [2022 Record of Account Transcript \[PDF\]](#)
- [2021 Record of Account Transcript \[PDF\]](#)
- [2020 Record of Account Transcript \[PDF\]](#)

The state only needs the first page showing yours and your spouse's names or last four digits of the SSN and tax filing period. All other information should be marked out / redacted.

FOR SPOUSE:

- **Marriage Certificate** - If married **less than 12 months** and you and your spouse have not filed a federal income tax return as married, you will need to submit a copy of your government-issued marriage certificate, **OR**
- **Tax Transcript** - If you and your spouse have been married for **12 or more months**, a Tax Return Transcript of your most recently filed federal income tax return showing you filed as married, either jointly or separately. The tax return transcript is the only official record of the tax return that you filed with the IRS. A copy of your tax return (Form 1040 or e-file documentation) will **not** be sufficient. The Form 1040 can be falsified and is not an official record of what was filed with the IRS. You can request a copy of your transcript from the IRS at www.irs.gov/individuals/get-transcript or by calling the IRS at 800-908-9946. Please submit **ONLY the first page**, showing yours and your spouse's names or the last four digits of their Social Security number and tax filing period. **All other information should be marked out.** If you are unable to obtain your transcript, please contact the Division of State Group Insurance.
- **Marriage Affidavit** (*must be notarized*) – If you were married in a foreign country or your spouse is a foreign national and does not have a valid social security number, you will need to submit a government issued marriage certificate that shows the date of marriage along with your marriage affidavit.

Screen shot below of tax transcript and section to mark out/redact:

This Product Contains Sensitive Taxpayer Data

Request Date: 10-11-2024
Response Date: 10-11-2024
Tracking Number:

Tax Return Transcript

SSN Provided: XXX-XX
Tax Period Ending: Dec. 31, 2023

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

SSN: XXX-XX-
SPOUSE SSN: XXX-XX-

NAME(S) SHOWN ON RETURN:

ADDRESS:

FILING STATUS: Married Filing Joint
FORM NUMBER: 1040
CYCLE POSTED:
RECEIVED DATE:
REMITTANCE:
EXEMPTION NUMBER:
DEPENDENT 1 NAME CTRL:
DEPENDENT 1 SSN:
DEPENDENT 2 NAME CTRL:
DEPENDENT 2 SSN:
DEPENDENT 3 NAME CTRL:
DEPENDENT 3 SSN:
DEPENDENT 4 NAME CTRL:
DEPENDENT 4 SSN:
PTIN:
PREPARER EIN: XXX-XX-
XX-XX

Income

TOTAL WAGES:
FORM W-2 WAGES:
TAXABLE INTEREST INCOME: SCH B:
TAX-EXEMPT INTEREST:
ORDINARY DIVIDEND INCOME: SCH B:
QUALIFIED DIVIDENDS:
REFUNDS OF STATE/LOCAL TAXES:
ALIMONY RECEIVED:
BUSINESS INCOME OR LOSS (Schedule C):
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:
CAPITAL GAIN OR LOSS: (Schedule D):
CAPITAL GAINS OR LOSS: SCH D PER COMPUTER:
OTHER GAINS OR LOSSES (Form 4797):
TOTAL IRA DISTRIBUTIONS:
TAXABLE IRA DISTRIBUTIONS:
TOTAL PENSIONS AND ANNUITIES:

**REDACT
THIS
SECTION
BEFORE
UPLOADING
TO PEOPLE
FIRST**

State FAQ's regarding dependent eligibility verification:

https://www.mybenefits.myflorida.com/content/download/148845/file/FAQs_Dependent%20Eligibility%20Verification%2007.2020.pdf

Common question:

My spouse and I filed our taxes separately. Can we still provide a tax return transcript? Yes. If you file as married, whether separate or joint, the tax return transcript should show both you and your spouse. If the transcript does not list your spouse's name but shows their Social Security Number, leave their SSN unredacted for verification purposes.