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


myBenefits

New Career MyH

Home / MyHealth / Eligibility - Dependent Verification

Eligibility - Dependent Verification

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]
Qualifying Status Change

To ensure accountability in the State Group Insurance program, effective July 1, 2020, the People First Service Center will be requesting documents as part of the Dependent Eligibility Verification process to confirm that an employee's 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.

If you fail to send sufficient documents in a timely manner, or if you submit documents that do not prove dependent eligibility, we will terminate dependent coverage 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

IRS

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File Pay Refunds Credits & Deductions Forms & Instructions Search

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

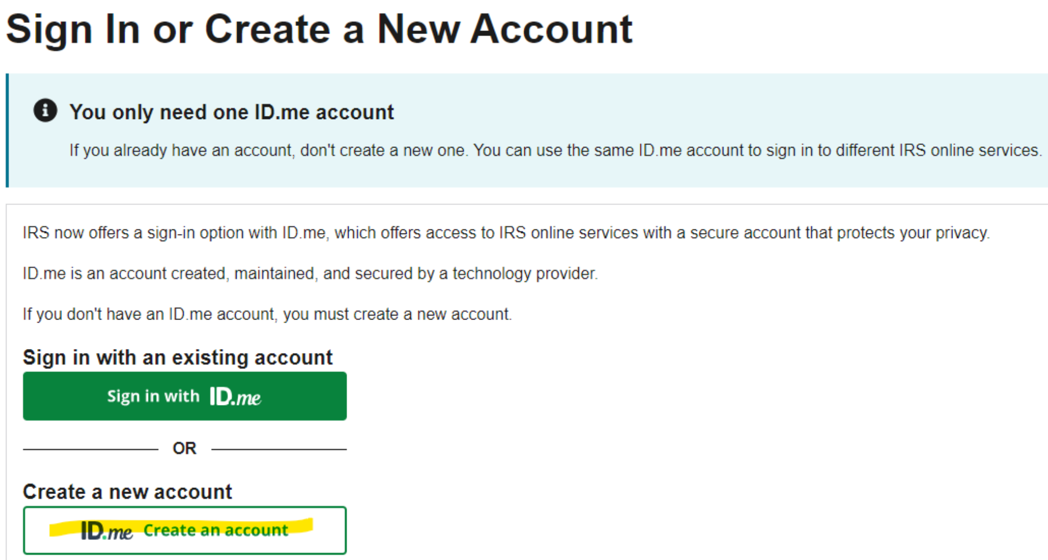
You can view your tax records in your Individual Online Account. This is the fastest, easiest way to:

- 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

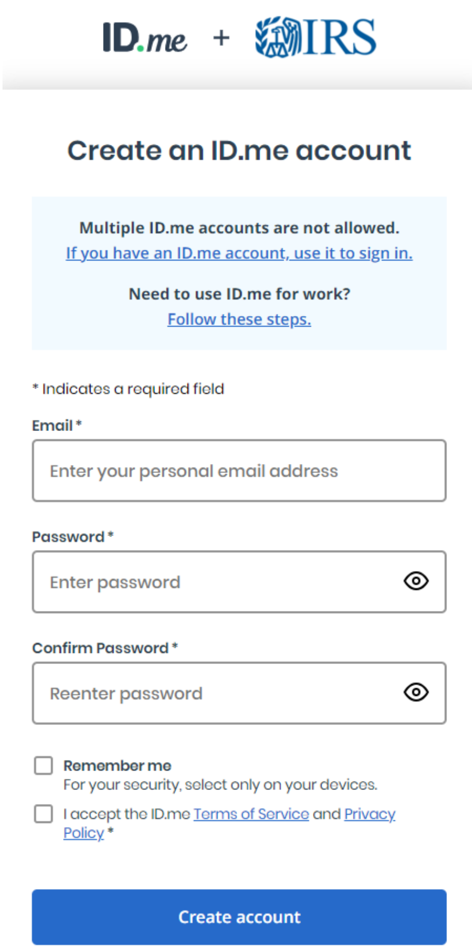
Sign in to your online account

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.

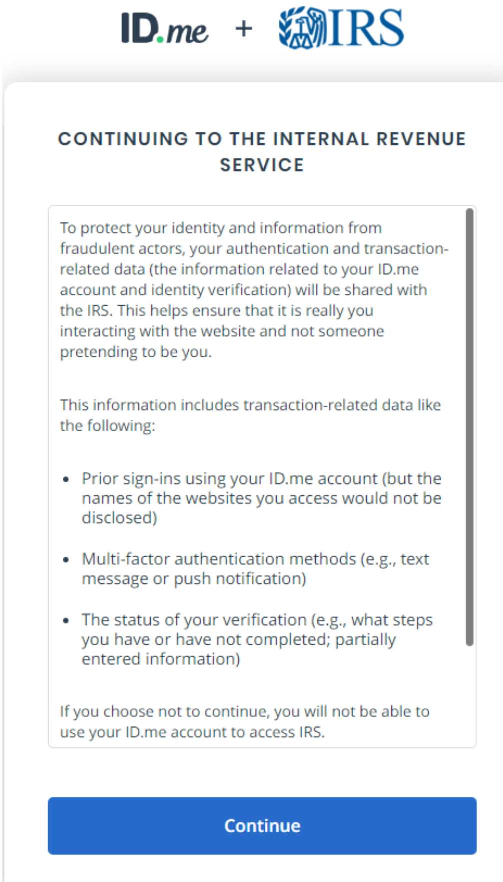
You will need to sign in with your ID.me account or select to **Create an account**. If you already have an account, skip to page 9.



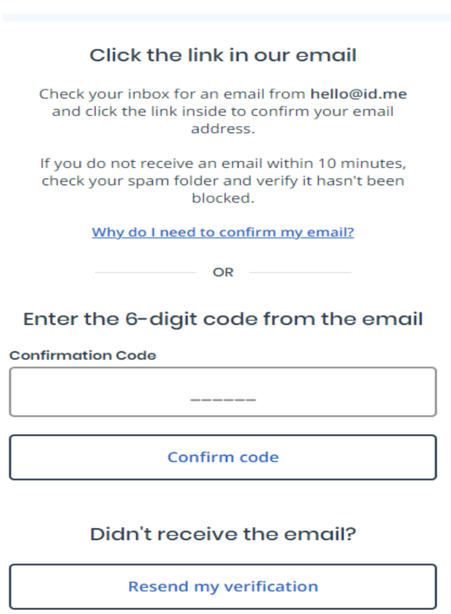
Please enter your email and create a password. Once complete, select **Create account** button.



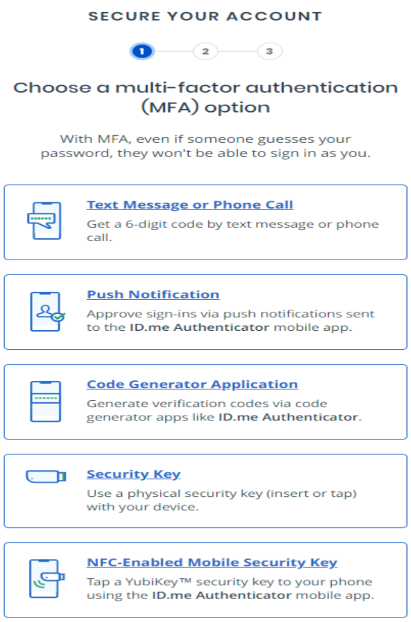
Read the information and select **Continue**.



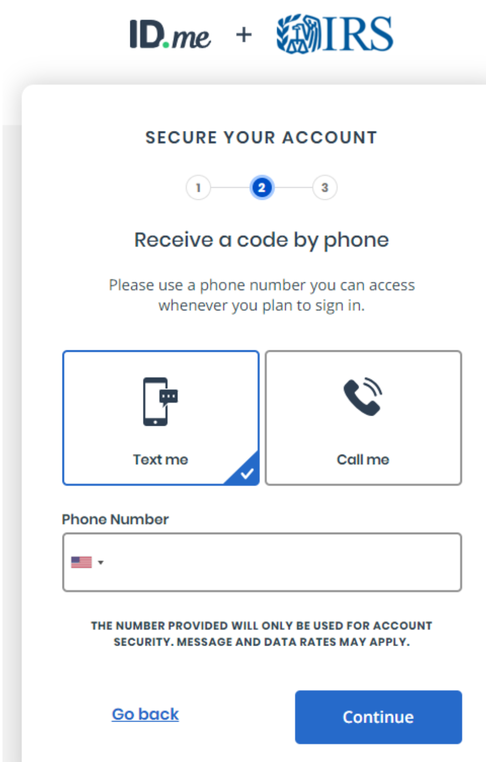
A verification email will be sent to the email you used to create the account. Open the email, click the link and follow the directions. Enter the confirmation code as requested and click to **Confirm**.



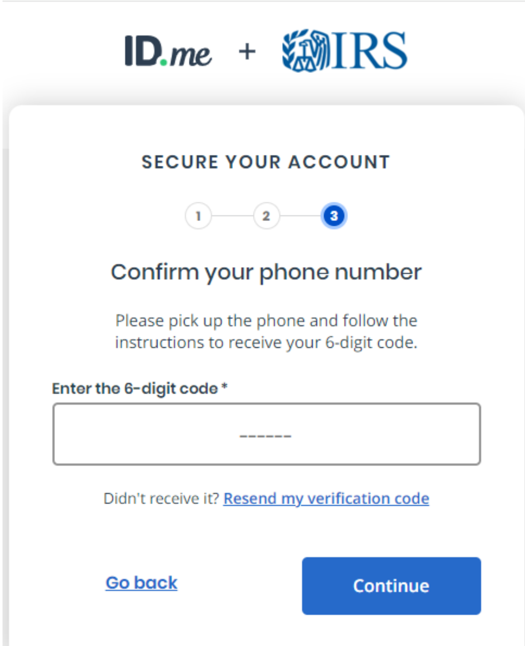
Select a multi-factor authentication option. Most common is the Text Message or Phone Call option.



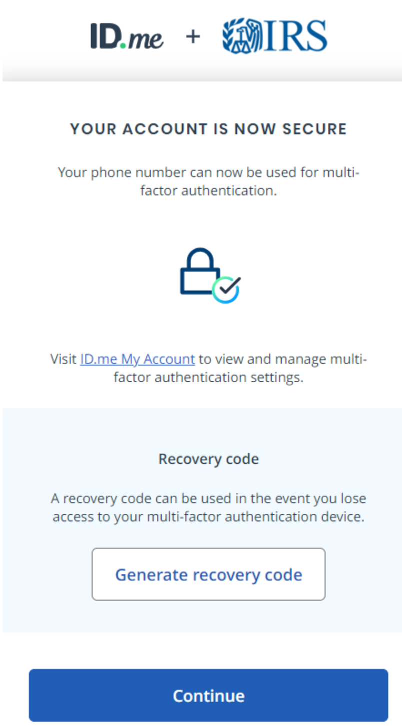
If you selected the text message or phone call option, you would then select to receive the authentication code by text or phone call. Enter the phone number, click **Continue**.



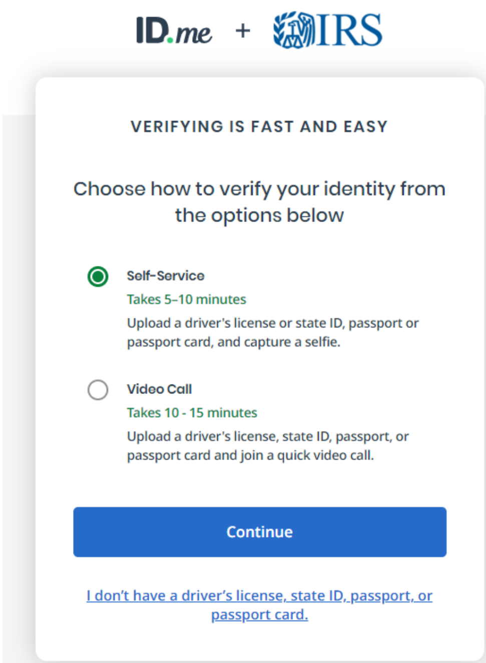
Enter the code you receive and select **Continue**.



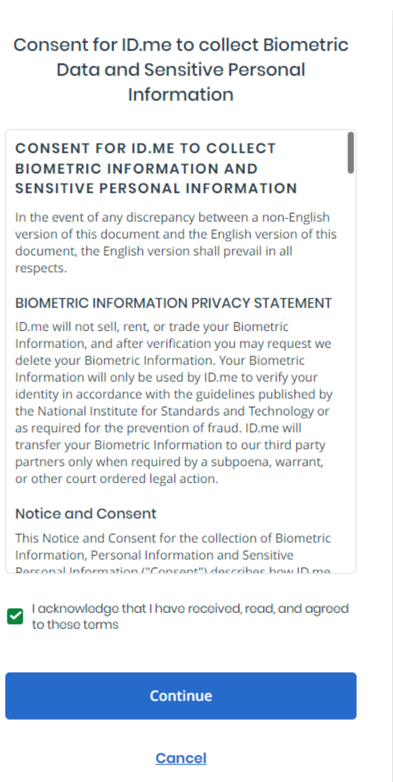
Select **Continue**.



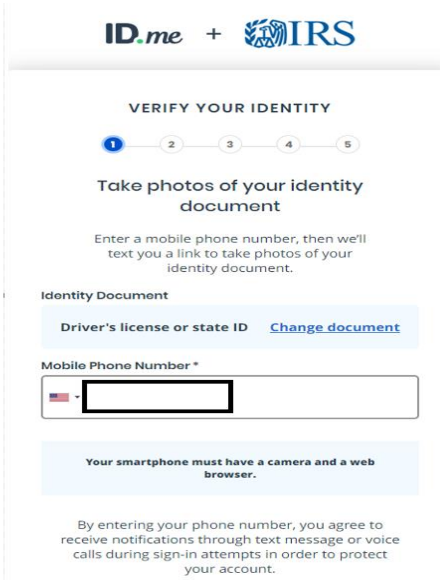
You will need to verify your identity. There are two options, self-service or schedule a video call. You will need to have your driver's license/picture ID available to take a picture for submittal on the self-service portal.



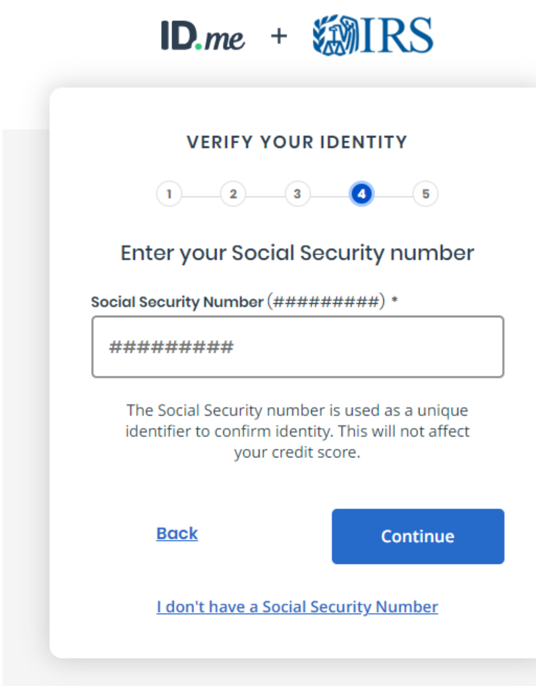
Please read the consent. You will need to select the acknowledgement and select **Continue**.



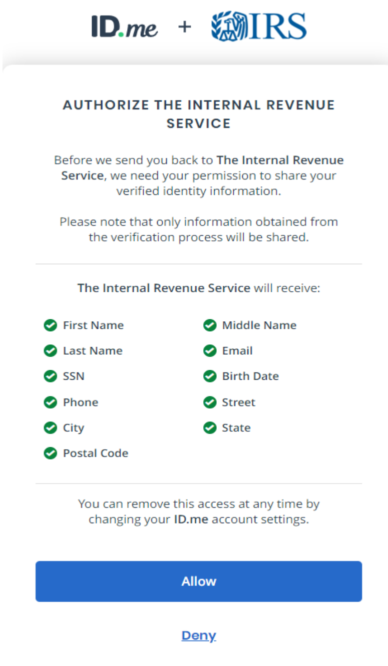
The process will then transition to your cell phone (unless you are completing the entire process from your cell phone). Enter your cell phone number.



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

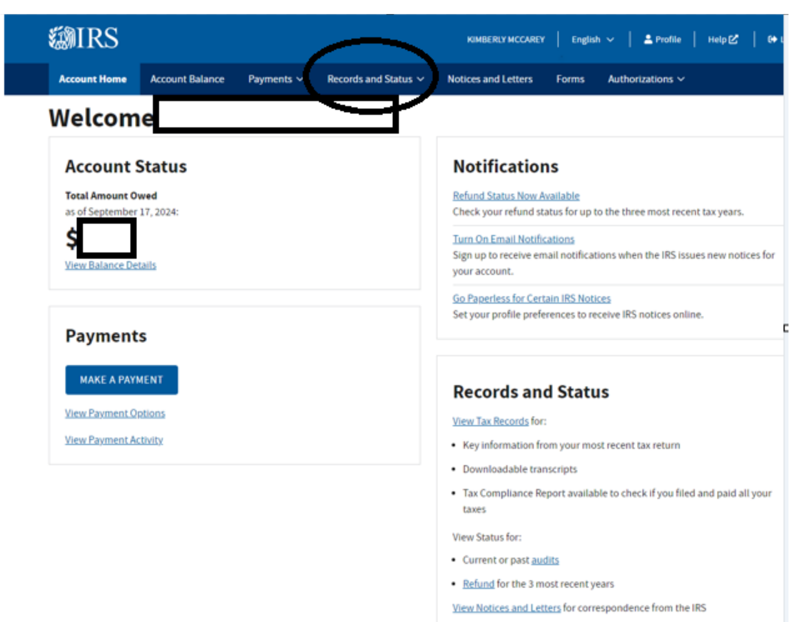


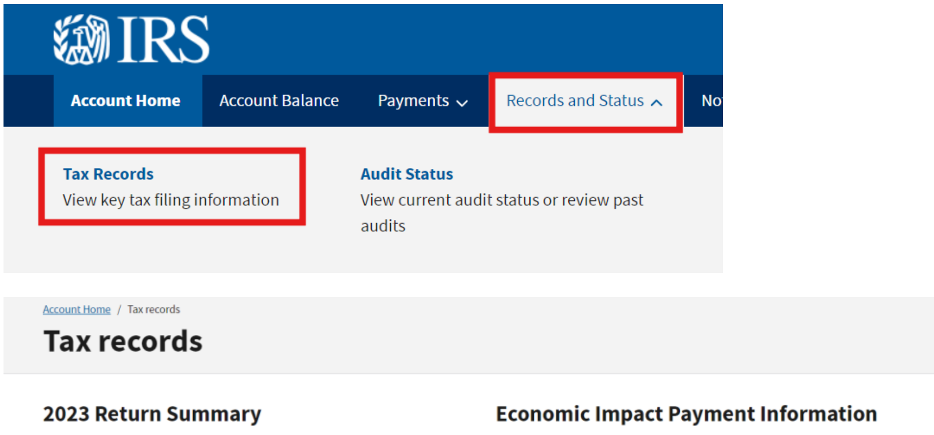
As part of the verification process, review the AUTHORIZE THE INTERNAL REVENUE SERVICE screen. Select **Allow**.



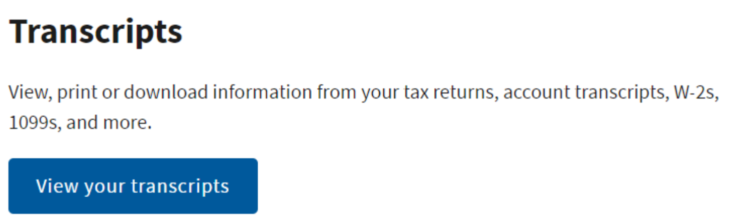
The process will continue by asking you to upload or take a picture of the front and back of your picture ID. The next step will access your phone camera for a selfie of your face to match to the picture ID. You will hold the phone close to your face while the camera flashes colors and then processes. 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:

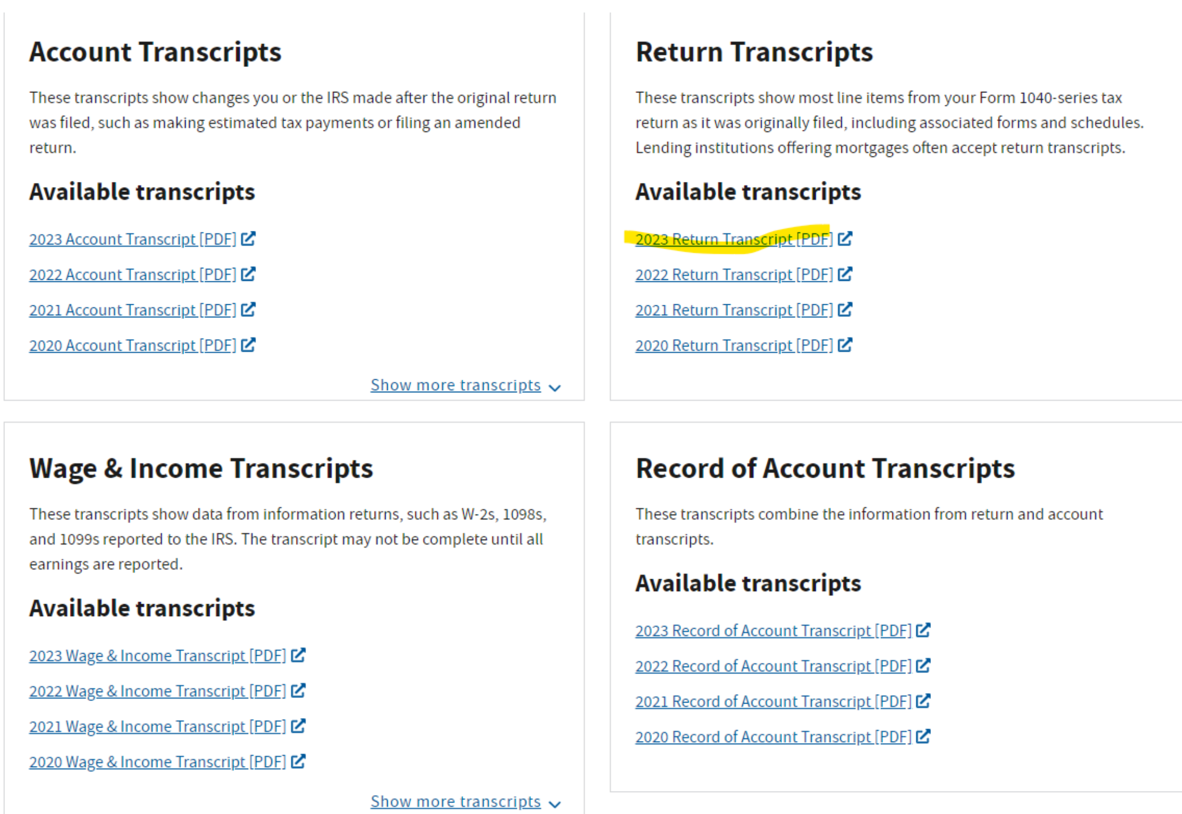




Scroll down on this webpage and select **View your transcripts**:



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



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:

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

Internal Revenue Service
United States Department of the Treasury

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:	XXX-XX-
PREPARER EIN:	XX-XXX

Income

TOTAL WAGES:..	REDACT THIS SECTION BEFORE UPLOADING TO PEOPLE FIRST
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:.......................................	

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.