

## Do It Yourself Tax Resolution

### Don Bell Law

- Sign into your account at the IRS
  - Go to IRS.gov
  - Click on “Sign into your Account”
  - Click “Sign into online account”
    - **If you do not already have an account**
      - Click on “[New to online account? Get started](#)”
      - You will have to have Government Issued ID, with picture - usually drivers license or military ID
- When your account at ID.me is established, log in.
- The records are called “Transcripts”
  - The transcripts are free
  - Tax return transcripts are only available for the immediately past three years
    - Those provide the information about what the tax return said.
    - If you want an actual copy of the return- there is a fee for that.
- When you get into the account, it will ask for ‘TIN’
  - That is your social security number, or the Employer Identification Number for a business.
- Fill in the name(s)
  - Go down to the boxes below and fill in the form number.
- Choose the PRODUCT TYPE Options are:
  - Tax Return Transcripts
  - Wage and Income
  - Account Transcript
  - Record of Account
  - Verification of non-Filing
- REQUEST PURPOSE
  - Several listed, choose the reason you need it for; taxes, real estate, etc.
- When you have filled in the years, click “Add Request”
  - When they come up, Click on “Continue”

- Print or save it, repeat the process
- Most of the time, for individuals, the form will be form 1040 or 1040A
  - In beginning tax year, put in the first year you want
  - In ending tax year, put in the final year you want.
- If you know you filed 2015, then start with 2015
  - If you are an individual, the beginning and ending month will be DEC
  - Go down and click “Request”
- Account Transcript list the information about whether a whether was filed,
  - And if you did not file a return, it is list “SFR”
    - The SFR stands for Substitute for Return, which means they created a return for you.
  - That return will not include any deductions nor information about you wages and or other income, so the tax amount is a lot higher than it would be if you filed the return itself.
  - Unless the Transcript shows that an “Examination” has taken place, they will usually let you file a return, and they will process it as “Amended” That would drop your “Balance Due” which is shown near the top of the transcript.
  - You should download the “Account Transcript” for each year that you need information about.
- I find it easier to work from a paper copy, so I print it as well as download it.
  - Account transcripts are usually available back to the year 2000
- To find what they received about your income,
  - Download the “Wage and Income” Transcript
  - It will show all W-2s and 1099s and other indicators about proceeds, real estate, brokerage accounts, etc...
- The form indicates the month of the year's end. Most of the time, that will be DEC
  - Enter the first year you want information about, then enter the final year you want information about
- Once you have entered the years, you have to **confirm**