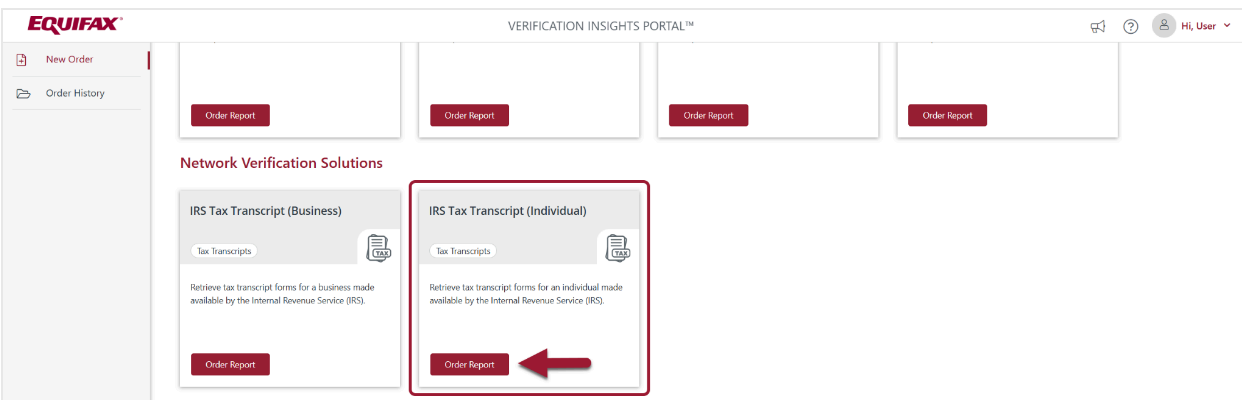
Client Training HQ

How to Order an IRS Tax Transcript for an Individual

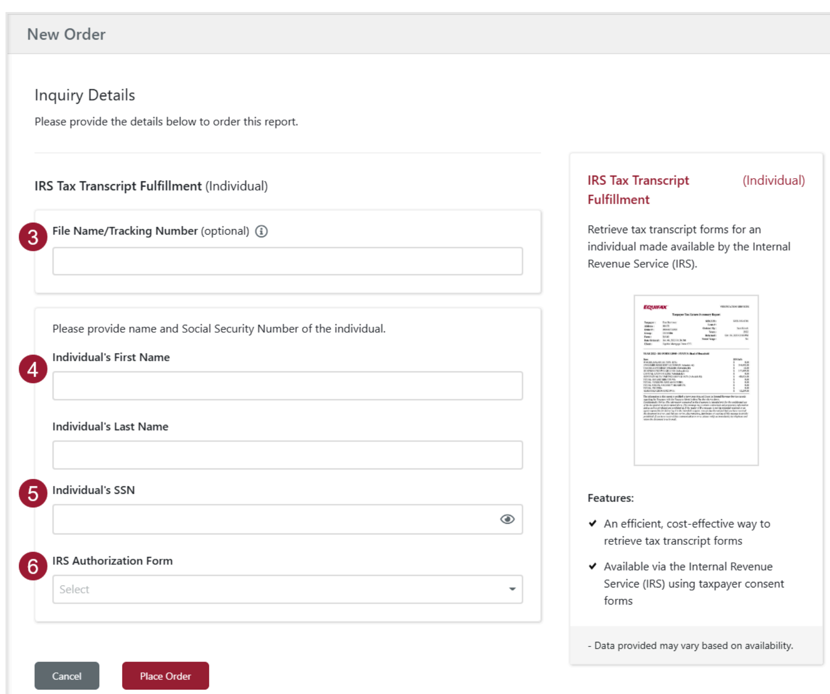
This document provides instructions on how to order IRS tax transcripts through for an individual in the Verification Insights Portal™ (VIP).

Beginning the Ordering Process

1. Log into the Verification Insights Portal™ by going to: www.theworknumber.com.
2. On the New Orders screen, scroll down to *Network Verification Solutions* and select the red **Order Report** button within the IRS Tax Transcript (Individual) tile.



3. Enter an optional **File Name/Tracking Number**
4. Input the borrower's **First and Last Name**
5. Input the borrower's **SSN**
6. Select how the **IRS Authorization Form** (4506-C) will be submitted (click to select one of the options below for next steps):
   - Upload a Completed Form
   - Generate Using Electronic Signature Powered By Adobe
   - Paperless (API)

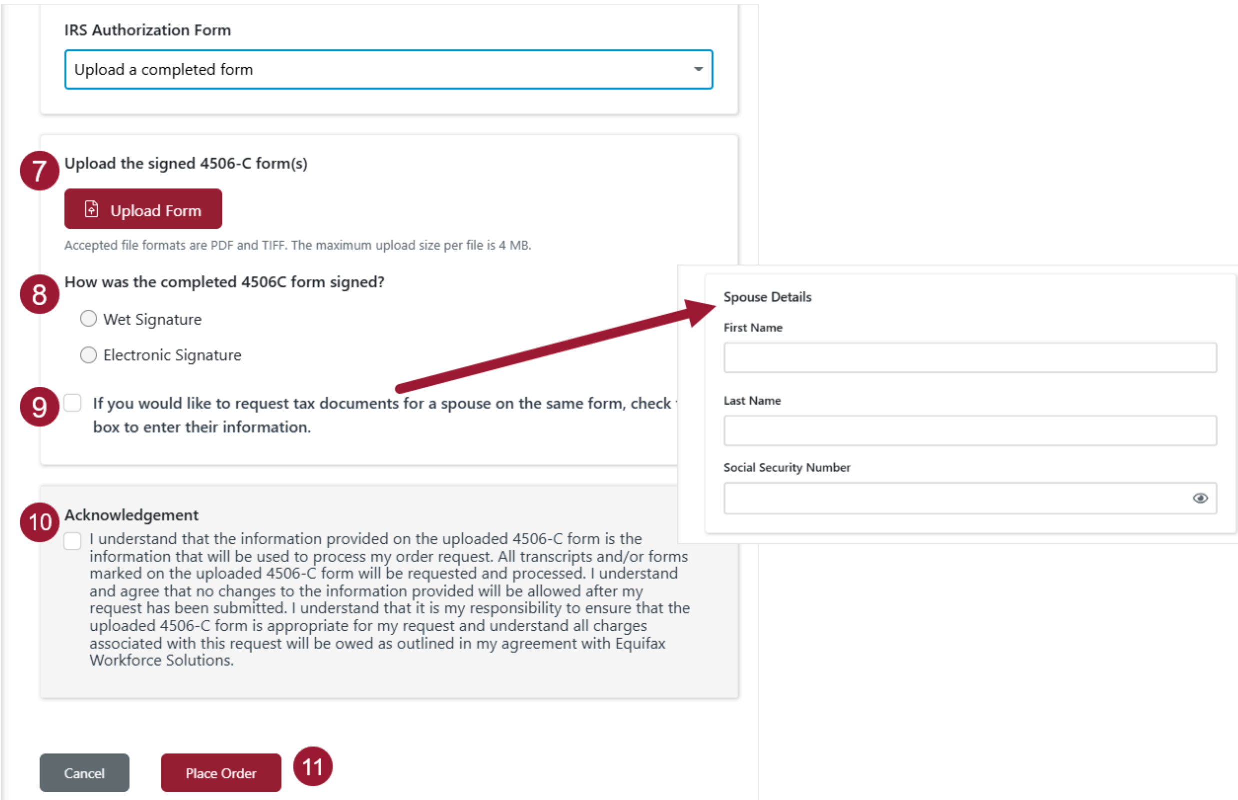


Images are examples and for information purposes only. They may vary across platforms and are subject to change.

Upload a Completed Form Option

By selecting this option, the 4506-C form has been completed either by handwriting on the printed form or by typing into the editable PDF version of the form (available here through irs.gov)

7. Click **Upload Form** to upload the completed and signed 4506-C form
8. Select how the form was signed: **Wet Signature** or **Electronic Signature**
   - If Electronic Signature is selected, choose which approved platform was used
9. If you would like to request **tax documents for a spouse**, check the box and then fill in necessary information for the spouse
10. Check the **Acknowledgement** box
11. Click **Place Order** to submit your request



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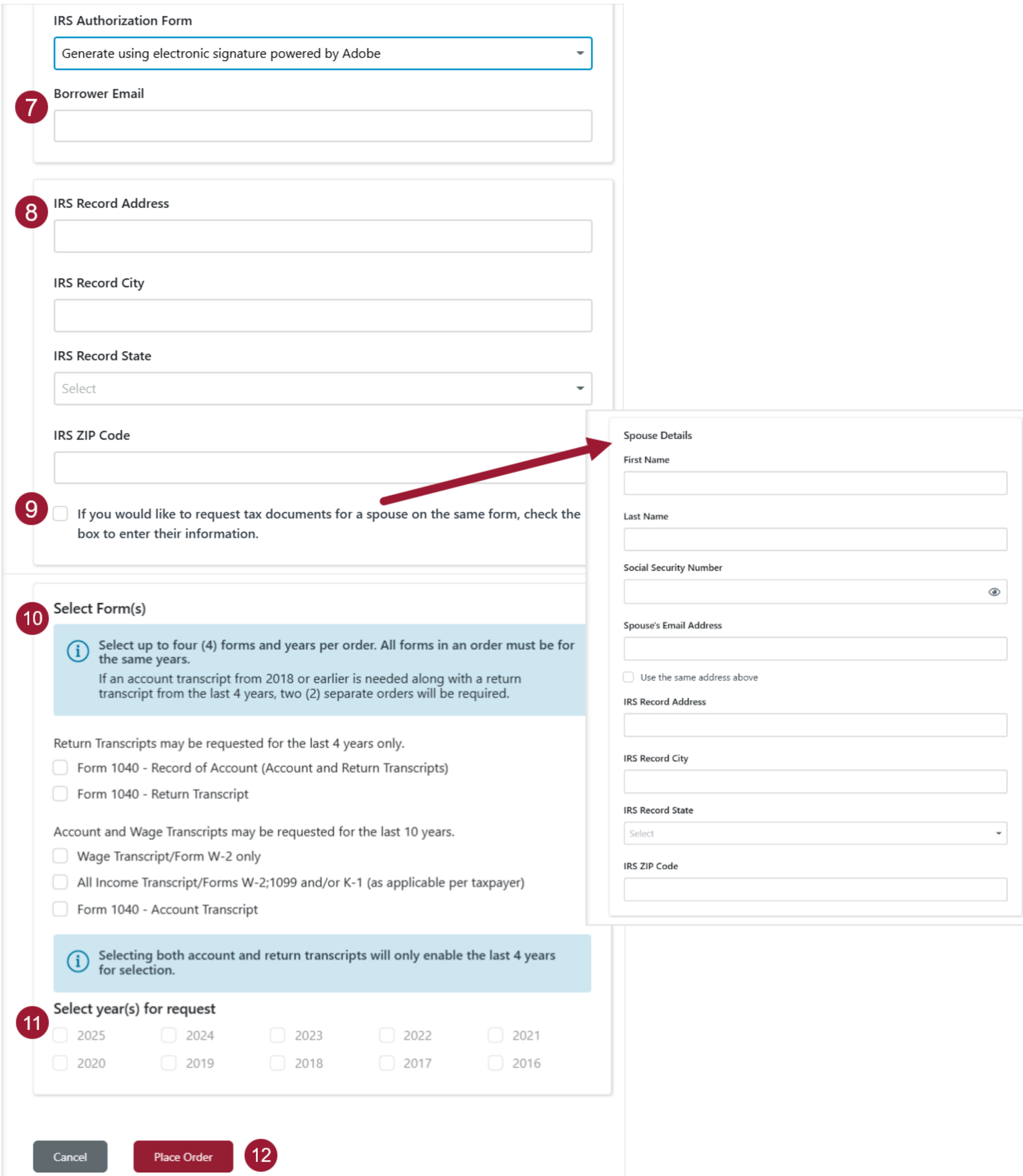
Generate Using Electronic Signature Powered by Adobe Option

By selecting this option, you will provide the relevant information for the 4506-C form during the ordering process. The form generated will be emailed to the borrower (and co-borrower, if needed) to be electronically signed.

7. Input the **Borrower Email** address
8. Input the borrower's **Address** on file with the IRS
9. If you would like to request **tax documents for a spouse**, check the box and then fill in necessary information for the spouse
10. Select the appropriate tax **Form(s)** for the business
11. Select the appropriate **Year(s)** for the tax form(s)
12. Click **Place Order** to submit your request

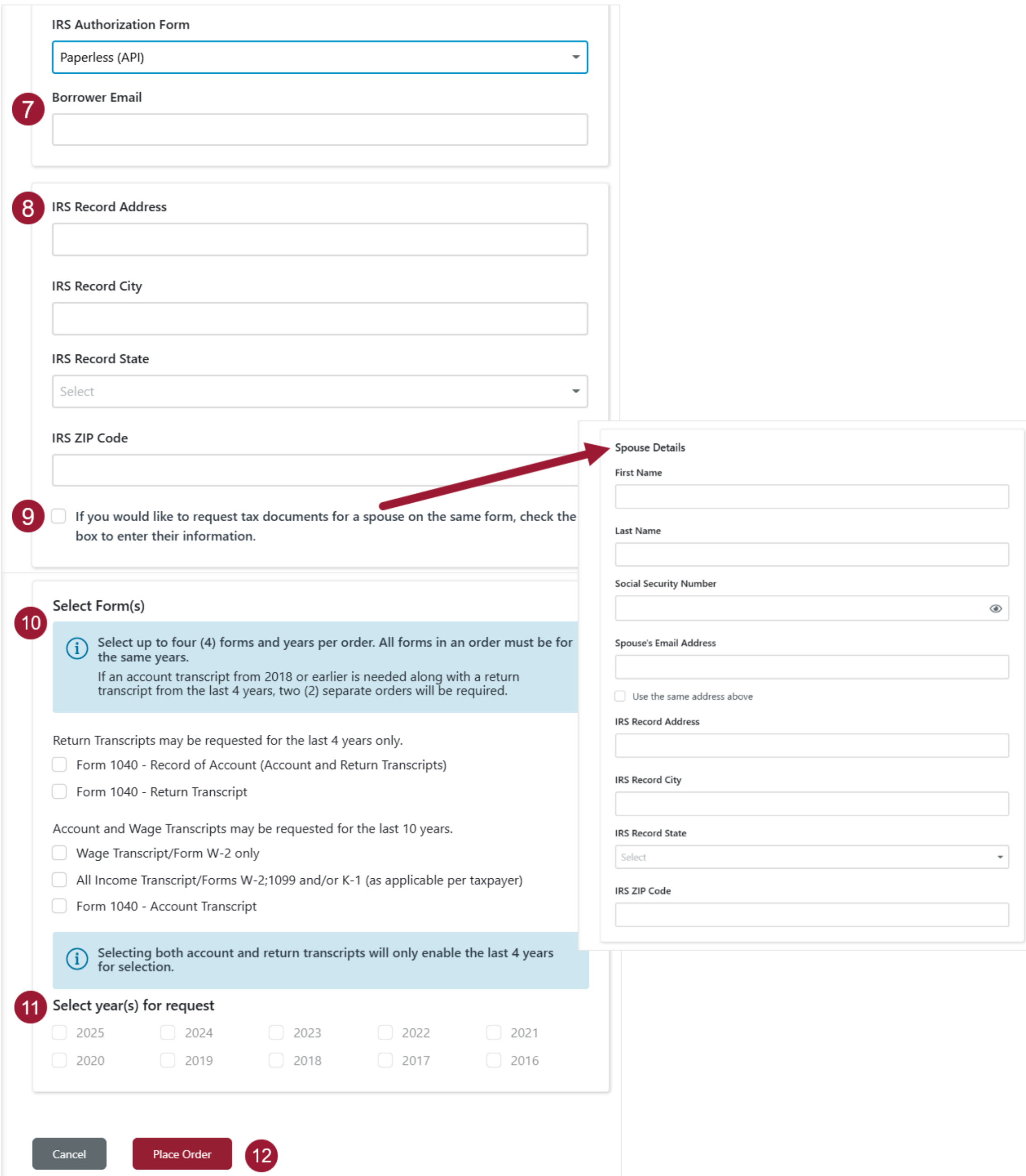


Paperless (API) Option

By selecting this option, you are agreeing to submit your tax transcript request utilizing the Equifax® direct integration with the IRS.

You will provide the relevant information for your request during this ordering process. Then, the borrower (and co-borrower, if needed) will receive an email directing them to login to irs.gov to authorize the request.

7. Input the **Borrower Email** address
8. Input the borrower's **Address** on file with the IRS
9. If you would like to request **tax documents for a spouse**, check the box and then fill in necessary information for the spouse
10. Select the appropriate tax **Form(s)** for the business
11. Select the appropriate **Year(s)** for the tax form(s)
12. Click **Place Order** to submit your request



If you are not contracted for the IRS Tax Transcript Fulfillment Service, please reach out to your **Equifax Account Executive** for more information. For contracted customers, additional assistance is available by contacting 888.749.4411 or VerifierCustomerService@equifax.com.

More Training Available!

For more information, view the following video, which covers the ordering process as well as the report output: Ordering IRS Tax Transcripts in VIP.

Check out additional training resources available on our site, Connections.

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.