

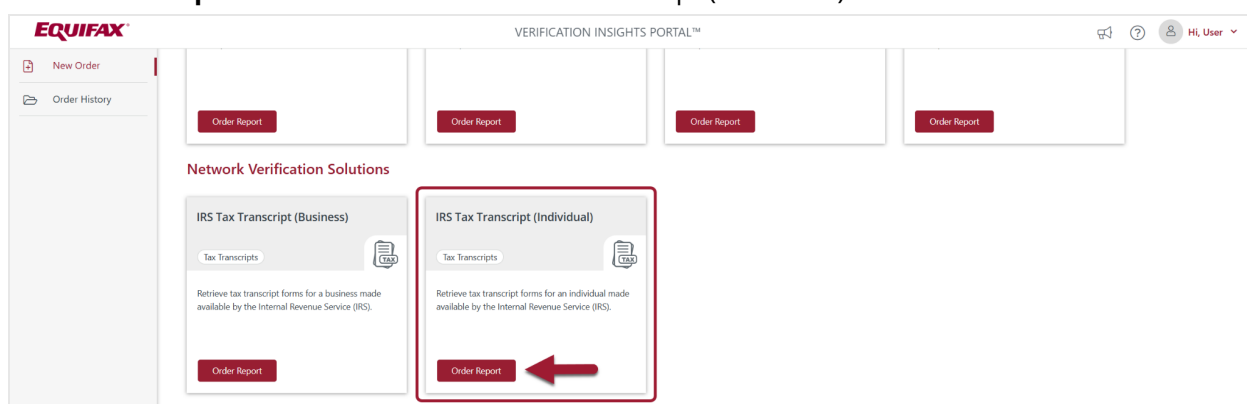
Client Training HQ

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).

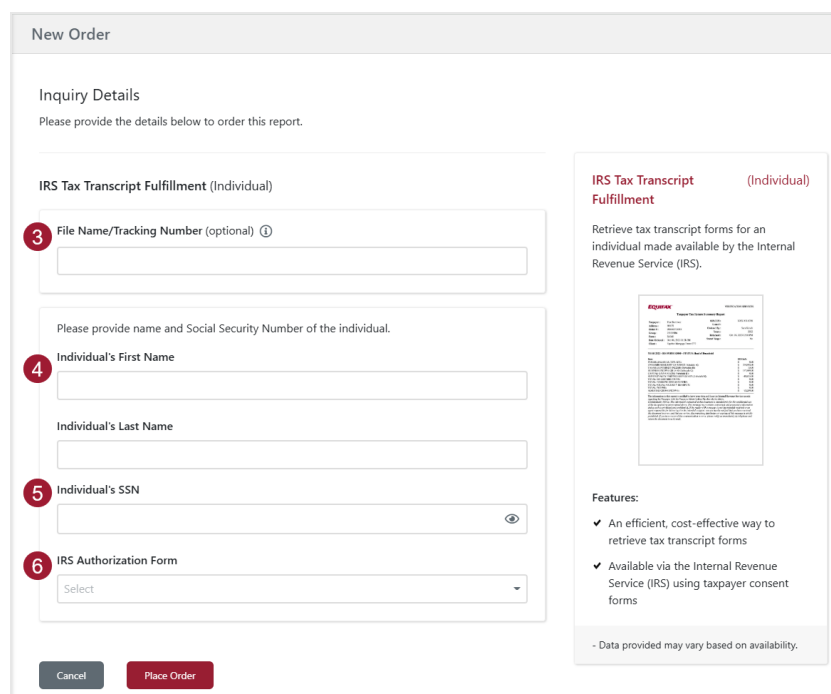
Beginning the Ordering Process

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

The screenshot shows the 'IRS Authorization Form' interface. At the top, a dropdown menu is set to 'Upload a completed form'. Below this, step 7 is 'Upload the signed 4506-C form(s)' with an 'Upload Form' button. A note states: 'Accepted file formats are PDF and TIFF. The maximum upload size per file is 4 MB.' Step 8 is 'How was the completed 4506C form signed?' with radio buttons for 'Wet Signature' and 'Electronic Signature'. Step 9 is 'If you would like to request tax documents for a spouse on the same form, check box to enter their information.' This step is linked to a 'Spouse Details' sidebar on the right, which contains input fields for 'First Name', 'Last Name', and 'Social Security Number'. Step 10 is 'Acknowledgement' with a checkbox and a paragraph of terms. At the bottom are 'Cancel' and 'Place Order' buttons, with a circled '11' next to the latter.

IRS Authorization Form

Upload a completed form

7 Upload the signed 4506-C form(s)

Upload Form

Accepted file formats are PDF and TIFF. The maximum upload size per file is 4 MB.

8 How was the completed 4506C form signed?

☐ Wet Signature

☐ Electronic Signature

9 ☐ If you would like to request tax documents for a spouse on the same form, check box to enter their information.

10 Acknowledgement

☐ I understand that the information provided on the uploaded 4506-C form is the information that will be used to process my order request. All transcripts and/or forms marked on the uploaded 4506-C form will be requested and processed. I understand and agree that no changes to the information provided will be allowed after my request has been submitted. I understand that it is my responsibility to ensure that the uploaded 4506-C form is appropriate for my request and understand all charges associated with this request will be owed as outlined in my agreement with Equifax Workforce Solutions.

Cancel Place Order 11

Spouse Details

First Name

Last Name

Social Security Number

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

The screenshot displays the 'IRS Authorization Form' generation interface. At the top, a dropdown menu is set to 'Generate using electronic signature powered by Adobe'. The form is divided into several sections with numbered callouts:

- 7 Borrower Email:** A text input field.
- 8 IRS Record Address:** A text input field.
- IRS Record City:** A text input field.
- IRS Record State:** A dropdown menu with 'Select' as the placeholder.
- IRS ZIP Code:** A text input field.
- 9 Spouse Details:** A checkbox labeled 'If you would like to request tax documents for a spouse on the same form, check the box to enter their information.' A red arrow points from this checkbox to a separate 'Spouse Details' panel on the right.
- 10 Select Form(s):** A section with an information icon and text: 'Select up to four (4) forms and years per order. All forms in an order must be for the same years. If an account transcript from 2018 or earlier is needed along with a return transcript from the last 4 years, two (2) separate orders will be required.' Below this, two groups of checkboxes are shown: 'Return Transcripts may be requested for the last 4 years only' (Form 1040 - Record of Account, Form 1040 - Return Transcript) and 'Account and Wage Transcripts may be requested for the last 10 years' (Wage Transcript/Form W-2 only, All Income Transcript/Forms W-2;1099 and/or K-1, Form 1040 - Account Transcript). A second information icon states: 'Selecting both account and return transcripts will only enable the last 4 years for selection.'
- 11 Select year(s) for request:** A grid of checkboxes for years from 2025 down to 2016.
- 12 Place Order:** A red button at the bottom right.

The 'Spouse Details' panel on the right contains the following fields: First Name, Last Name, Social Security Number (with an eye icon for visibility), Spouse's Email Address, a checkbox 'Use the same address above', and IRS Record Address, City, State, and ZIP Code fields.

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

IRS Authorization Form

Paperless (API)

7 Borrower Email

8 IRS Record Address

IRS Record City

IRS Record State

Select

IRS ZIP Code

9 ☐ If you would like to request tax documents for a spouse on the same form, check the box to enter their information.

10 Select Form(s)

i Select up to four (4) forms and years per order. All forms in an order must be for the same years.
If an account transcript from 2018 or earlier is needed along with a return transcript from the last 4 years, two (2) separate orders will be required.

Return Transcripts may be requested for the last 4 years only.

☐ Form 1040 - Record of Account (Account and Return Transcripts)

☐ Form 1040 - Return Transcript

Account and Wage Transcripts may be requested for the last 10 years.

☐ Wage Transcript/Form W-2 only

☐ All Income Transcript/Forms W-2;1099 and/or K-1 (as applicable per taxpayer)

☐ Form 1040 - Account Transcript

i Selecting both account and return transcripts will only enable the last 4 years for selection.

11 Select year(s) for request

☐ 2025 ☐ 2024 ☐ 2023 ☐ 2022 ☐ 2021

☐ 2020 ☐ 2019 ☐ 2018 ☐ 2017 ☐ 2016

12

Spouse Details

First Name

Last Name

Social Security Number

Spouse's Email Address

☐ Use the same address above

IRS Record Address

IRS Record City

IRS Record State

Select

IRS ZIP Code

Cancel Place Order

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.