Federal and State Transcripts

Transcripts can be a helpful tool when confirming your payments for the filing year. The fastest way to access IRS transcripts and FTB payment/credit history is for the taxpayer to pull them online.

IRS Transcripts

Go to: https://www.irs.gov/individuals/get-transcript
- Select Get Transcript Online
- Sign in w/ your ID.me login or create one if you have not already. Once you have created your ID.me you will not have to do it again.
  - *ID.me provides secure identity proofing, authentication, and group affiliation verification for government and businesses across sectors.*
- After logging in, select the reason you need a transcript: "Federal Tax"
- To pull your payment history, select the Account Transcript for 2023 by clicking the year under the Account Transcript box.
- Print/Save the transcript

*There is also an option to request by mail.

FTB Payment/Credit History Report

Go to: https://www.ftb.ca.gov/myftb/
- Login to your account or create an account if you do not already have one.
  - Create an account:
    - Click Create My FTB Account
    - Accept and Continue
    - Enter your Name, Username, Email, & click continue.
    - Set up your Security Questions & Password
    - Click Individual
    - Enter your SSN
    - Verify Identity & CA AGI

- Once you are logged in, click "Account" to select the report you wish to print.
- We recommend you print your "Payment History" and "Estimate Payments & Credits"