

Tips for Finding Prior-Year AGI



**HELPFUL
TIPS**

Clients using The Ohio Benefit Bank™ to e-file their tax returns are required to “sign” the electronic form using prior-year AGI.

Here are some ways the prior-year AGI may be located:

- If the client used the OBB to file taxes last year, the AGI and PIN will automatically populate, and the prior-year tax return will also be available on the “My Taxes” page/tab.
- The prior-year AGI can be found on line 37 on the Form 1040, line 21 on the Form 1040-A or line 4 on the Form 1040-EZ.
- If a paid tax preparer was used, the client may be able to get a copy of the prior-year tax return from the preparer.
- If a tax preparation software or online program was used last year, the client may be able to log into the program to view an electronic copy of the prior-year return.
- First time tax filers over the age of 16 and individuals who did not file any tax return last year enter zero as the AGI and choose a “new” PIN when e-filing through the OBB.
- The IRS no longer offers the option to generate a new PIN to use to e-file taxes. To access prior-year AGI, the IRS website features “**Get Transcript**” self-help tools to receive or access a tax return transcript.
 - ✓ The “**Get Transcript Online**” tool allows a person to immediately view the AGI after creating a login and completing/passing the Secure Access identity verification process. The website details the information that is required to complete the process and answer the questions.
 - ✓ The “**Get Transcript by Mail**” tool can be used if a client cannot pass the Secure Access identity verification process and needs to request a tax return transcript. Clients can also call the IRS at: **1-800-908-9946** to request a transcript by mail. It takes **5 to 10 days** to receive the paper tax transcript.
 - ✓ Both tools are available at: <https://www.irs.gov/individuals/get-transcript>.

Note: A paper tax return can be completed and printed through the OBB without the prior-year AGI.