IRS Tax Transcript: How to Request

During the verification process, another option is to obtain an ***IRS Tax Return Transcript*** from the IRS.   Always be sure to request your ***Tax Return Transcript*** – a document from the IRS that is a summary of your tax return as filed.

Transcripts are available to request online and provided two ways:

- **Online** – Tax Return Transcript available to print or download.
    - Please be aware: this option contains multiple security steps. You must register with the IRS to use this service. The registration process takes approximately 15+ minutes. You will be asked to provide sensitive personal information (credit card or bank account number) as well as to verify through a mobile phone text and email confirmation.

- **By Mail** – Tax Return Transcript sent to the mailing address from your latest tax return typically in **5**-10 days.
    - You are not required to register with the IRS system, though you will enter SSN, date of birth, and address to match your tax return.

Instructions to Request:

1. Visit the IRS Get Transcript website at (https://www.irs.gov/individuals/get-transcript).
2. Select "Get Transcript Online" or "Get Transcript by Mail"
3. If requesting online, select "Get Transcript Online" and then "Get Started" to register to use the online service.
    a. Follow the on-screen instructions to verify personal information, email, financial accounts/credit card number and mobile phone number.
    b. Proceed to request "Tax Return Transcript" for proper tax year*
    c. Download and save or print to send to the Financial Aid Office.
4. If requesting by mail, select "Get Transcript by Mail"
    a. Follow the on-screen instructions to enter name, date of birth, and Social Security number.
    b. Enter your address which was used for your tax return. Please note the IRS uses the United States Postal Service (USPS) version of your address.
        - You may need to exclude punctuation (no period after abbreviations, no #) in your address
        - You may need to abbreviate (Apt. rather than Apartment or St. rather than street)
    c. For joint returns, use the primary tax filer's SSN, date of birth, address and zip code.
    d. When your address is verified, select the tax year* and Tax Return Transcript to request.

IRS   Welcome to Get Transcript

You can get various transcript types online or by mail. The method you used to file your tax return, and whether you had a balance due, affects your current year transcript availability. **Note:** If you need a photocopy of your return, you must use Form 4506.

What You Need

To register and use this service, you need:

- your SSN, date of birth, filing status and mailing address from latest tax return,
- access to your email account,
- your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- a mobile phone with your name on the account.

What You Get

- View, print or download your transcript
- Transcript types available online
- Username and password to return later

What You Need

To use this service, you need your:

- SSN or Individual Tax Identification Number (ITIN),
- date of birth, and
- mailing address from your latest tax return

What You Get

- Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you
- Transcript types available by mail

Requesting by phone or in-person:

If you experience issues with the online Tax Return Transcript request, you may try the automated phone transcript service at 1-800-908-9946 to receive the transcript via mail
Please allow 5-10 days for delivery.

If you experience further issues, you may choose to request an appointment with the IRS
In-person by looking up your location on the IRS website (https://www.irs.gov/uac/contact-your-local-irs-office-1).

*The tax year used for a FAFSA is usually the calendar year prior to the start of the academic year

- **2015** is the tax year for the 2016-17 academic year (fall 2016, spring 2017, summer 2017)
- **2014** is the tax year for the 2015-16 academic year (fall 105, spring 2016, summer 2016

Recent victims of identify theft:

You will likely experience difficulty using the IRS Data Retrieval Tool or requesting a Tax Return Transcript.