

## **Requesting IRS Transcript**

### **IRS Tax Return Transcript**

- Originally filed return information

- This requirement can be completed by using the Data Retrieval Tool (DRT) through FAFSA or a copy can be requested through the IRS.

#### How to Order Transcripts

1. Transcript Toll free telephone line
  - 1-800-908-9946
  - Allow 5-10 business days to receive Tax Return to address recorded
2. IRS.gov- <https://www.irs.gov/individuals/get-transcript>
  - Get transcript online-Immediate delivery of PDF transcript
  - Get transcript by mail- delivered in 5-10 calendar days via postal mail to the address on record
3. Mail in form- 4506T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
  - Paper form submitted via postal mail
  - Allow 5-10 business days to receive requested transcript

#### Using the Get Transcript option:

- Go to <https://www.irs.gov/individuals/get-transcript>
- In the Tools section on the homepage, click "Get Transcript for My Tax Records."
- Click "Get Transcript Online".
- Under "Sign Up", select "Create an Account". If you already have an account, enter your user ID under "Sign In".
- Enter your name and email address. Click on "Send Email Confirmation Code".
- Retrieve and enter the confirmation code. Click on "Verify Email Confirmation Code".
- Enter the tax filer's social security number, date of birth, tax filing status, street address, and zip or postal code. Use the address currently on file with the IRS. Generally, this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Select checkbox and click the "Continue" button to proceed as guest. Proceeding as a guest user will require you to enter this information every time you access the system. If you would like this information stored for future use do not check the box. Click the "Continue" button to create a User ID and password.
- Answer 4 multiple choice security questions derived from your credit file.
- Select the reason for getting a transcript – "Higher Education/Student Aid".
- Click on the tax year needed under "Tax Return Transcript" or "Verification of Non-Filing Letter". \*\*You will need 2016 tax year information to complete the 2018-2019 Free Application for Federal Student Aid (FAFSA) and 2017 tax year information to complete the 2019-2020 FAFSA.
- You can print the document and/or save as a PDF. DO NOT save a letter unless you are on your personal computer.
- When finished, log out and close the browser.
- Please Note: Do not use the third party address option! Have the transcript sent to yourself, then forward to our office.

Exception for 18-19 and 19-20 academic years only: If you are unable to obtain a transcript you may provide our office with a signed copy of your tax return that was submitted to the IRS.