

Requesting an IRS Tax Transcript

What is Verification? When you submit the FAFSA you may be selected for a process called "verification" by the Department of Education. This means that the Office of Financial Aid is required by the Department of Education to determine the accuracy of the information you provided through your FAFSA. If you are required for verification you must complete the IRS Data Retrieval Feature on the FAFSA or submit a Tax Return Transcript to comply with federal guidelines before any financial aid can be awarded. To complete the IRS Data Retrieval, please visit www.FAFSA.ed.gov.

Should you request an IRS Tax Transcript? If you or your parent cannot (or choose not to) complete the IRS Data Retrieval then you may request an IRS Tax Transcript (after you complete your taxes) and submit it to the Office of Financial Aid. You must request an IRS Tax Transcript if:

- You (or your parent) did not use the IRS Data Retrieval process either at initial FAFSA filing or through subsequent corrections.
- You changed information after using the IRS Data Retrieval process.
- Your tax status is "Married, filing separately."
- Your parents filed separate tax returns.
- You (or your parents) had a change in marital status after the end of the tax year on December 31.
- You (or your parents) filed an amended tax return.
- You filed taxes outside the U.S.

How do you request an IRS Tax Transcript?

Step 1:

- On the [IRS website \(www.irs.gov\)](http://www.irs.gov), choose "**Get Your Tax Record**" under the Tools menu bar (*Figure 1-1*).



Figure 1-1

Step 2:

- Click on “Get Transcript ONLINE” or “Get Transcript by MAIL” option (Figure 2-1).

You can get various Form 1040-series [transcript types](#) online or by mail. If you need your prior year **Adjusted Gross Income (AGI)** to e-file, choose the **tax return transcript** type when making your request. If you only need to find out how much you owe or verify payments you made within the last 18 months, you can [view your tax account](#).

The method you used to file your tax return, e-file or paper, 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](#).

Get Transcript Online	Get Transcript by Mail
<p>What You Need</p> <p>To register and use this service, you need:</p> <ul style="list-style-type: none">• 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.	<p>What You Need</p> <p>To use this service, you need your:</p> <ul style="list-style-type: none">• SSN or Individual Tax Identification Number (ITIN),• date of birth, and• mailing address from your latest tax return
<p>What You Get</p>	<p>What You Get</p> <ul style="list-style-type: none">• Return or Account transcript types delivered by mail• Transcripts arrive in 5 to 10 calendar days at the address we have on file for you.

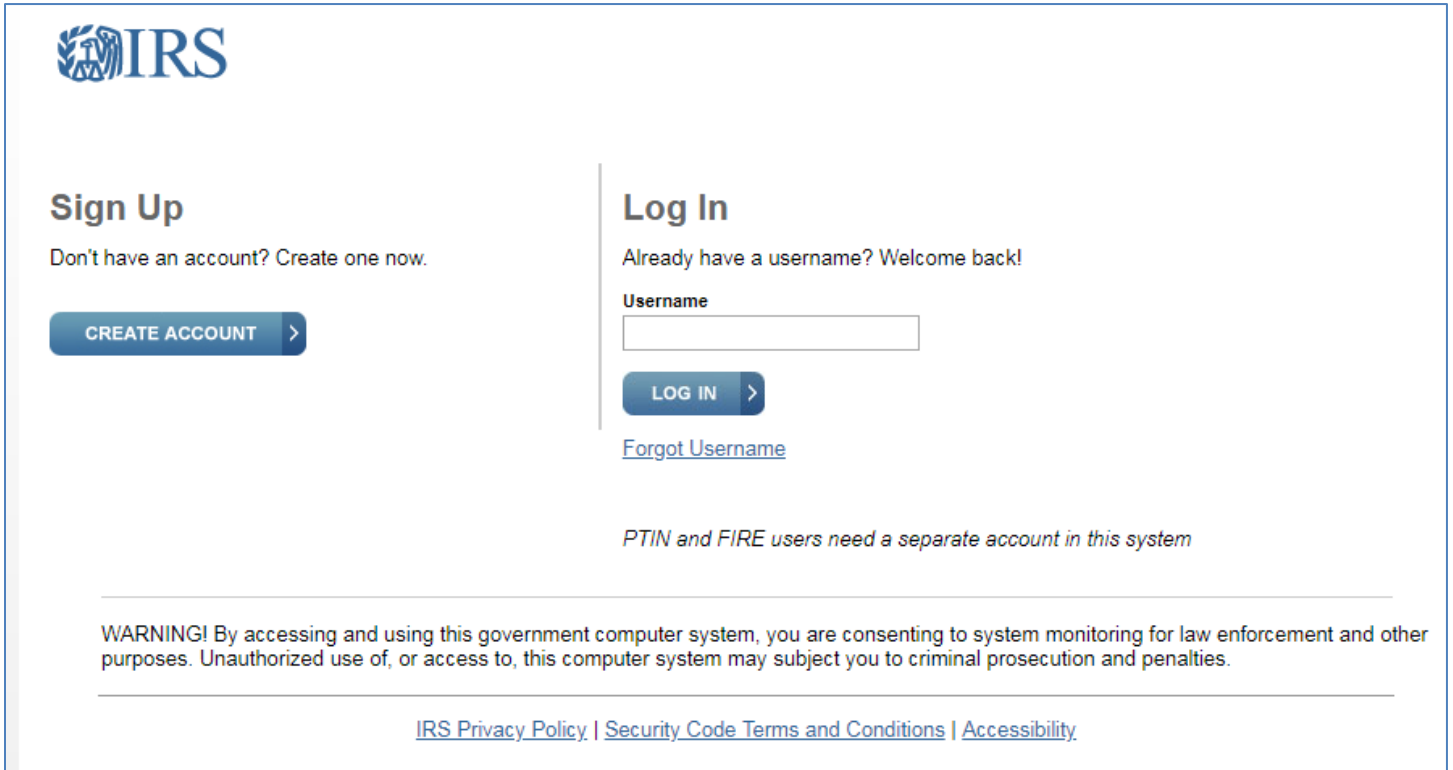
Figure 2-1

- (continued below)

Step 3a- Get Transcript Online

(If you wish to get your transcript by mail, skip this step and move to Step 3b)

- If you click the online option, click on “GET STARTED” if it is your first time requesting a transcript or log in with your credentials if you are a returning user (Figure 3-1).



The screenshot shows the IRS website's login and sign-up interface. At the top left is the IRS logo. Below it, the 'Sign Up' section includes the text 'Don't have an account? Create one now.' and a blue button labeled 'CREATE ACCOUNT >'. To the right, the 'Log In' section includes the text 'Already have a username? Welcome back!', a text input field labeled 'Username', a blue button labeled 'LOG IN >', and a link for 'Forgot Username'. Below these sections is a note: 'PTIN and FIRE users need a separate account in this system'. At the bottom, there is a warning: 'WARNING! By accessing and using this government computer system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of, or access to, this computer system may subject you to criminal prosecution and penalties.' and a footer with links for 'IRS Privacy Policy', 'Security Code Terms and Conditions', and 'Accessibility'.

Figure 3-1

- Follow the prompts from the IRS. Some people may have difficulty using the online tax transcript option. If you run into an issues, please use the mail in transcript option.
- (continued below)

Step 3b (Follow this step if you did not do Step 3a)

- Enter your personal information into the fields (SSN or ITIN, date of birth, and address). See Figure 3-2.

IRS.gov [Contact Us](#) | [Exit](#)

Get Transcript [En Español](#) | [Privacy Notice](#)

All fields are required

Social Security Number (SSN) or [Individual Tax ID Number \(ITIN\)](#) [?](#)

Day ▾ Month ▾

[Street Address](#) [?](#)

[ZIP or Postal Code](#) [?](#)

[Continue](#)

[IRS Privacy Policy](#)

Figure 3-2

- Continued below

- Request a "Return Transcript" as the transcript type and select the appropriate year (Figure 3-3).

IRS.gov Contact Us | Exit

Get Transcript by Mail

Type of Transcript [?](#)
Return Transcript ▼

for Tax Year [?](#)
2017 ▼

[Continue](#)

[IRS Privacy Policy](#)

Figure 3-3

- You should receive a confirmation page showing that your transcript should arrive within 5-10 business days (Figure 3-4).

The screenshot shows the IRS.gov website interface. At the top left is the IRS logo and 'IRS.gov'. At the top right are links for 'Contact Us' and 'Exit'. The main heading is 'Get Transcript by Mail'. Below the heading, a message states: 'We have accepted your request for a 2015 Return Transcript . Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you.' A second message says: 'If you need more than one copy of your transcript you are allowed to make copies for your personal records.' At the bottom of the main content area are two buttons: 'Exit' and 'Request a different transcript'. At the very bottom of the page is a link for 'IRS Privacy Policy'.

Figure 3-4

Additional Information

- **If you are having trouble logging into the IRS website to retrieve your Tax Transcript, you must contact the IRS to resolve your issue. The Master's University Office of Financial Aid cannot provide technical assistance for this website.**
- **If you are still having issues you may call the IRS to request a transcript. Please visit the instructions on our verification page for details.**