

Need an IRS Tax Return Transcript?

GET TRANSCRIPT - ONLINE

Here's what new users need to get started:

- A readily available email address;
- Your Social Security number or Individual Tax Identification Number;
- Your filing status and address from your last-filed tax return;
- Access to certain account numbers for either:
 - credit card, or
 - home mortgage loan, or
 - home equity (second mortgage) loan, or
 - home equity line of credit (HELOC), or
 - car loan.
- A readily available mobile phone. Only U.S. based mobile phones may be used. Your name must be associated with the mobile phone account. Landlines, Skype, Google Voice or similar virtual phones as well as phones associated with pay-as-you-go plans cannot be used;
- If you have a “credit freeze” on your credit records through Equifax, it must be temporarily lifted before you can successfully complete this process.

Because this process involves verification using financial records, there may be a “soft notice” placed on your credit report. This notice does not affect your credit score.

To securely access Get Transcript Online, first-time users must:

- Submit their name and email address to receive a confirmation code;
- Enter the emailed confirmation code;
- Provide their SSN, date of birth, filing status and address on the last filed tax return;
- Provide some financial account information for verification such as the last eight digits of their credit card number or car loan number or home mortgage account number or home equity (second mortgage) loan number;
- Enter a mobile phone number to receive a six-digit activation code via text message;
- Enter the activation code;
- Create username and password, create a site phrase and select a site image.

Returning taxpayers who have not completed the new secure access process:

- Log in with an existing username and password;
- Submit financial account information for verification, for example, the last eight digits of a credit card number or car loan number or home mortgage account number or home equity (second mortgage) loan account number;
- Submit a mobile phone number to receive an activation code via text;
- Enter the activation code.

Returning taxpayers who have completed the new secure access process:

- Log in with an existing username and password;
- Receive a security code text via mobile phone provided with account set up;
- Enter the security code into secure access.

If at any point, you cannot validate your identity – for example, you cannot provide financial verification information or you lack access to a mobile phone – you may use Get Transcript by Mail. Get Transcript by Mail allows you to go online and select the mail option. The transcript will be mailed to the address of record and will be delivered within five to 10 days.

Need an IRS Tax Return Transcript?

GET TRANSCRIPT - IRS DATA RETRIEVAL TOOL

1. Go to FAFSA.ED.GOV
2. Select the "Login" button.
3. Login using your (the student's) FSA ID.
4. Select "Make FAFSA Corrections."
5. Create a Save Key and click "Next."
6. Select "Financial Information" tab from the top of the page.
7. Select "Already Completed" for the tax return filing status and answer the eligibility questions.
8. If you are eligible to use the IRS Data Retrieval Tool, you can now click on the Link to IRS button. If you are not eligible to use the IRS Data Retrieval Tool you will need to order a transcript by mail.
9. Click "OK" to leave the FAFSA website and enter the IRS Data Retrieval Tool website.
10. Click "OK" to accept the IRS Data Retrieval Tool terms of use.
11. Enter the requested information and click "Submit." Remember to enter your address exactly as it appeared when you filed your taxes.
12. Review the information that the IRS has retrieved from your tax returns. Check the box to "Transfer My Tax Information into the FAFSA" and click "Transfer Now." Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.
13. Do not update any answers that say "Transferred from the IRS" or your school may require you to supply additional documentation. Answer the additional questions and click "Next."
14. Continue to the "Sign & Submit" tab. Follow all of the instructions carefully to submit your FAFSA correction.

GET TRANSCRIPT BY MAIL

➔ Available on the IRS Web site at <http://www.irs.gov/Individuals/Get-Transcript>

1. Click "Get Transcript by Mail"
2. Enter the tax filer's Social Security Number, date of birth, 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 US Postal Service, the IRS may have the updated address on file.
3. Click "Continue"
4. In the Type of Transcript field, select "Return Transcript" and in the Tax Year field, select "2016".
5. If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
(IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS)