

Tax Return Transcript Request Directions

Office of Student Financial Planning

How to Obtain a Free Tax Return Transcript from the IRS

If your FAFSA is selected for verification, and you did not use the IRS Data Retrieval option, or you changed the IRS data, you will be required to request a tax transcript from IRS and submit it to the Office of Student Financial Planning. Please make sure you request a **Tax Return Transcript**. DO NOT request a Tax Account Transcript or Record of Account because they cannot be used for verification purposes.

Online Requests

- Visit www.irs.gov/Individuals/Get-Transcript.
- Select either the **Get Transcript ONLINE** button or the **Get Transcript by MAIL** button. Both options provide the same results, but the ONLINE option is immediate.
- **Get Transcript ONLINE** Instructions
 - Click the CREATE AN ACCOUNT button and complete the requested steps. If you already have an account, simply Sign In with your credentials instead.
 - On the Request Transcript page, select the "Higher Education/Student Aid" option and click on the Return Transcript for the tax year requested.
 - Print the Tax Return Transcript and deliver it to the Office of Student Financial Planning.
- **Get Transcript by MAIL** Instructions
 - Enter the requested information and click Continue.
 - Select "Return Transcript" for the Type of Transcript, select the tax year requested for Tax Year, and click Continue.
 - If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address on file with the IRS within 5 to 10 business days. IRS Tax Return Transcripts cannot be sent to an address other than the one on file with the IRS.
 - Once received, deliver the Tax Return Transcript to the Office of Student Financial Planning.

Telephone Request

- Call the IRS at 1-800-908-9946.
- Tax filers must follow prompts to enter the primary tax filer's social security number and the numbers in their street address. Generally, this will be numbers of the street address that were listed on the latest tax return filed. However, if an address change has been completed either through the IRS or the US Postal Service, the IRS may have the updated address on file. For a joint tax return, use the primary tax filer's social security number, date of birth, street address, and zip or postal code.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter the tax year requested.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address on file with the IRS within 5 to 10 business days. IRS Tax Return Transcripts cannot be sent to an address other than the one on file with the IRS.
- Once received, deliver the Tax Return Transcript to the Office of Student Financial Planning.

Nonfiler Letter Online Request – Available after June 15

- Visit www.irs.gov/Individuals/Get-Transcript.
- Select either the **Get Transcript ONLINE** button or the **Get Transcript by MAIL** button. Both options provide the same results, but the ONLINE option is immediate.
- **Get Transcript ONLINE** Instructions
 - Click the CREATE AN ACCOUNT button and complete the requested steps. If you already have an account, simply Sign In with your credentials instead.
 - On the Request Transcript page, select the "Higher Education/Student Aid" option and click on the "Verification of Nonfiling Letter" for the tax year requested.
 - Print the letter and deliver it to the Office of Student Financial Planning.