

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 to comply with federal guidelines before any financial aid can be awarded. To complete the IRS Data Retrieval, please follow this [LINK](#).

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 a Tax Transcript**" under the Tools menu bar (*Figure 1-1*).

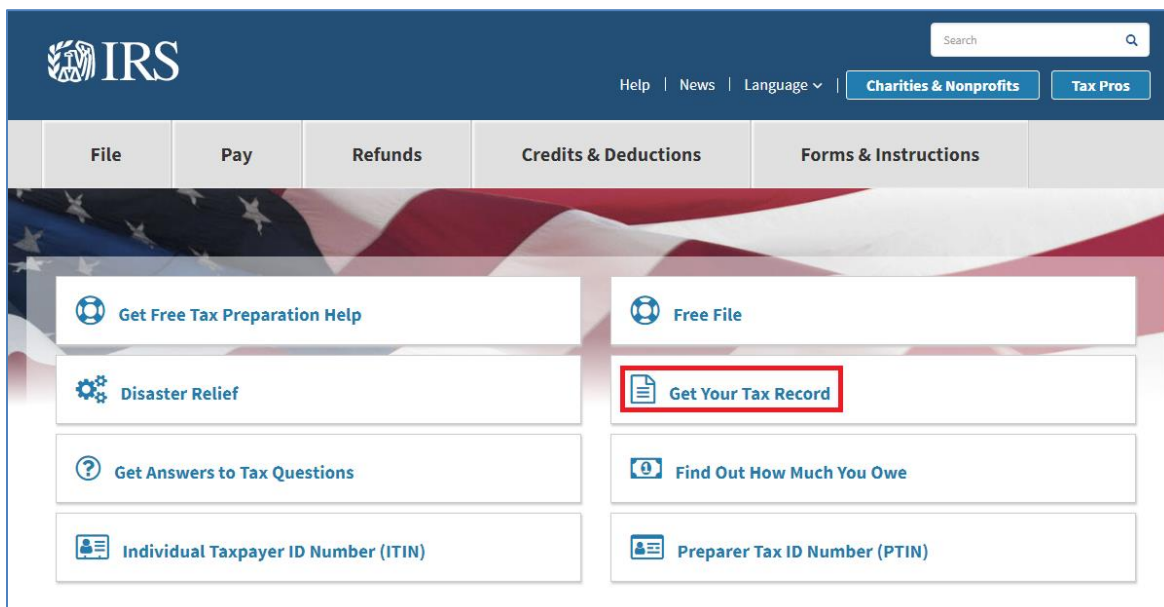


Figure 1-1

Step 2:

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

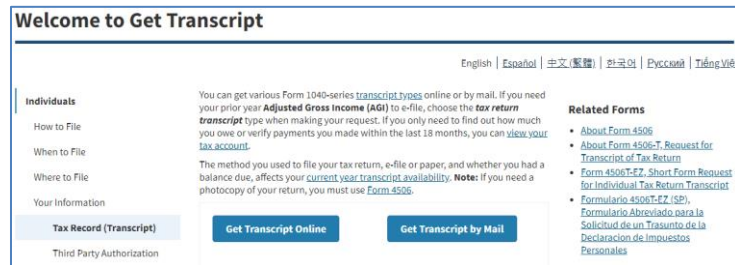


Figure 2-1

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).

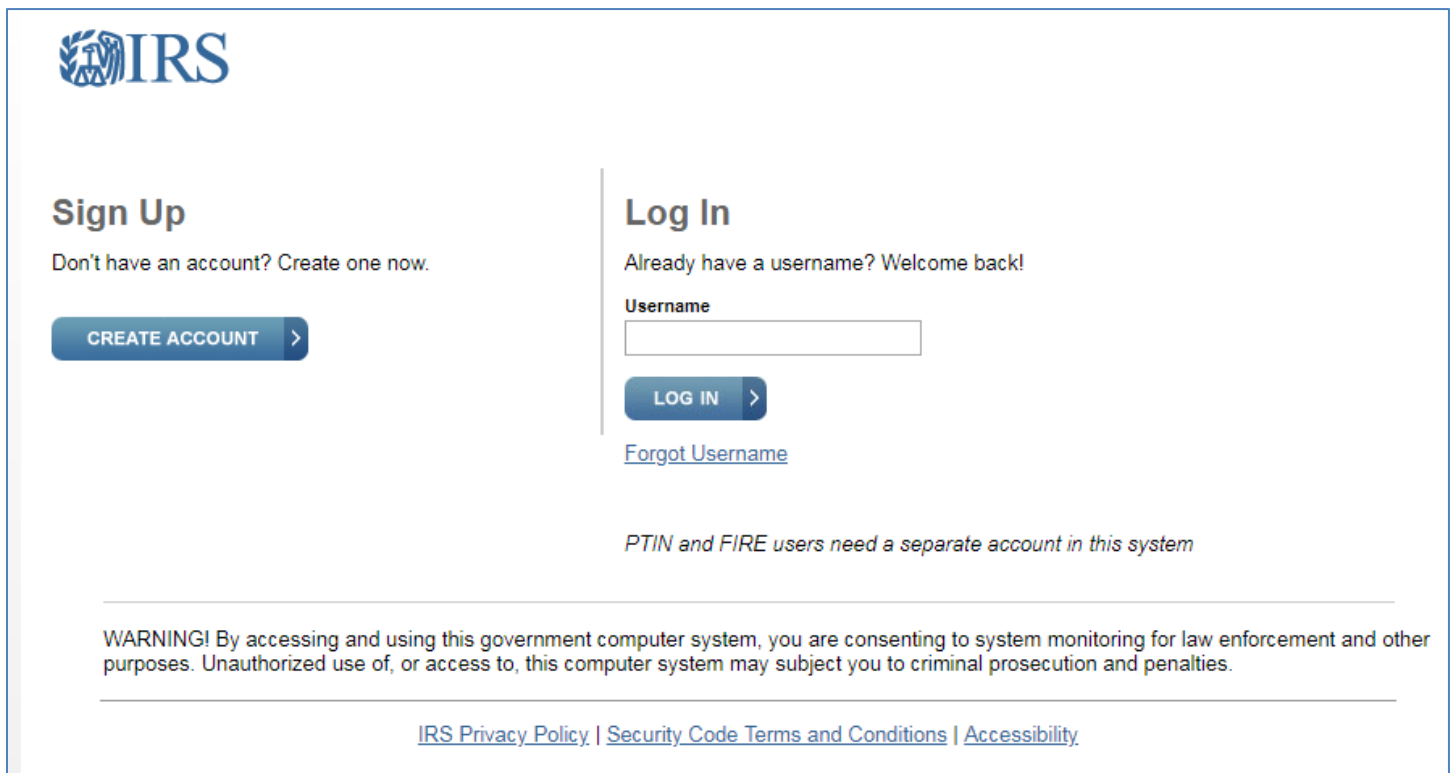


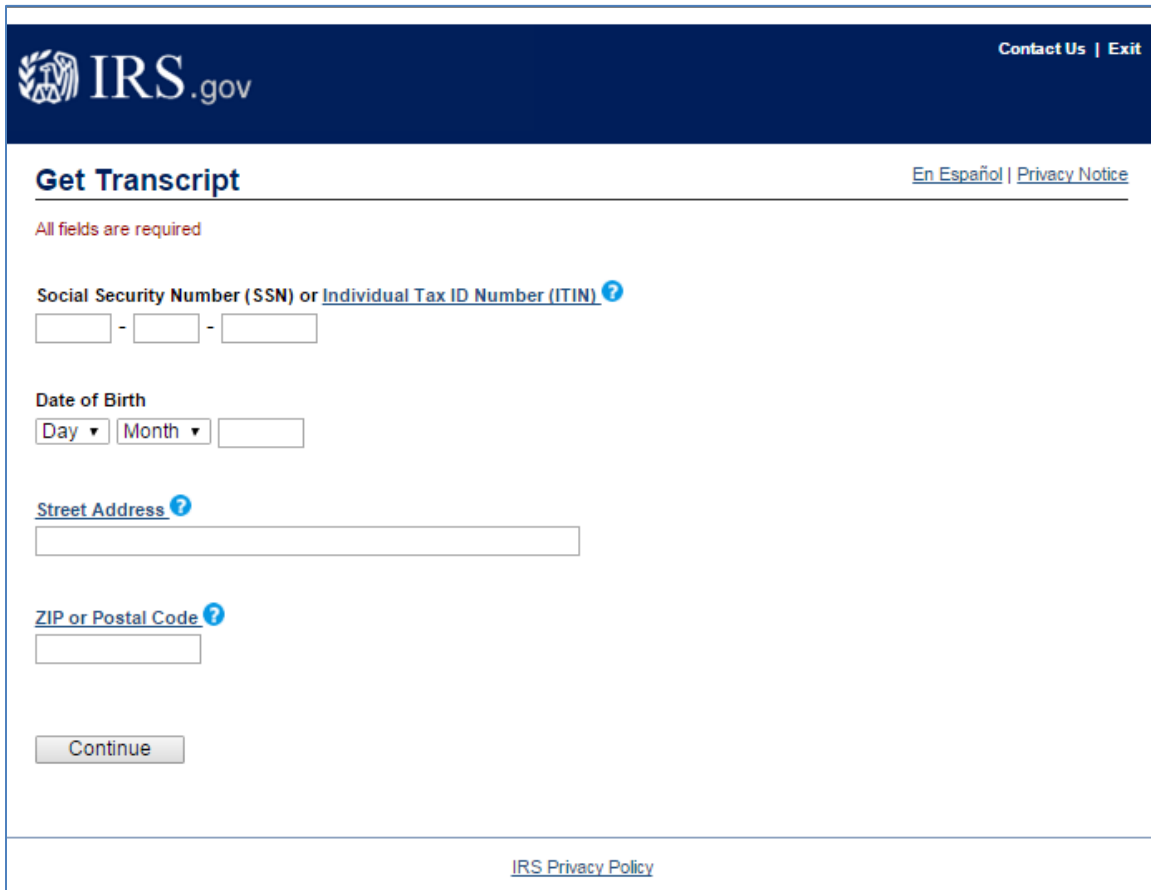
Figure 3-1

- 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.

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.



The screenshot shows the IRS.gov website with a dark blue header. The IRS logo is on the left, and 'Contact Us | Exit' is on the right. Below the header, the page title is 'Get Transcript' with a link to 'En Español | Privacy Notice'. A red message states 'All fields are required'. The form includes fields for 'Social Security Number (SSN) or Individual Tax ID Number (ITIN)' (with a help icon), 'Date of Birth' (with dropdowns for Day and Month), 'Street Address' (with a help icon), and 'ZIP or Postal Code' (with a help icon). A 'Continue' button is at the bottom. A footer link for 'IRS Privacy Policy' is at the very bottom.

IRS.gov

Contact Us | Exit

Get Transcript

[En Español](#) | [Privacy Notice](#)

All fields are required

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

- -

Date of Birth

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).

[Contact Us](#) | [Exit](#)

Get Transcript by Mail

[Type of Transcript](#) 

Return Transcript ▼

for [Tax Year](#) 

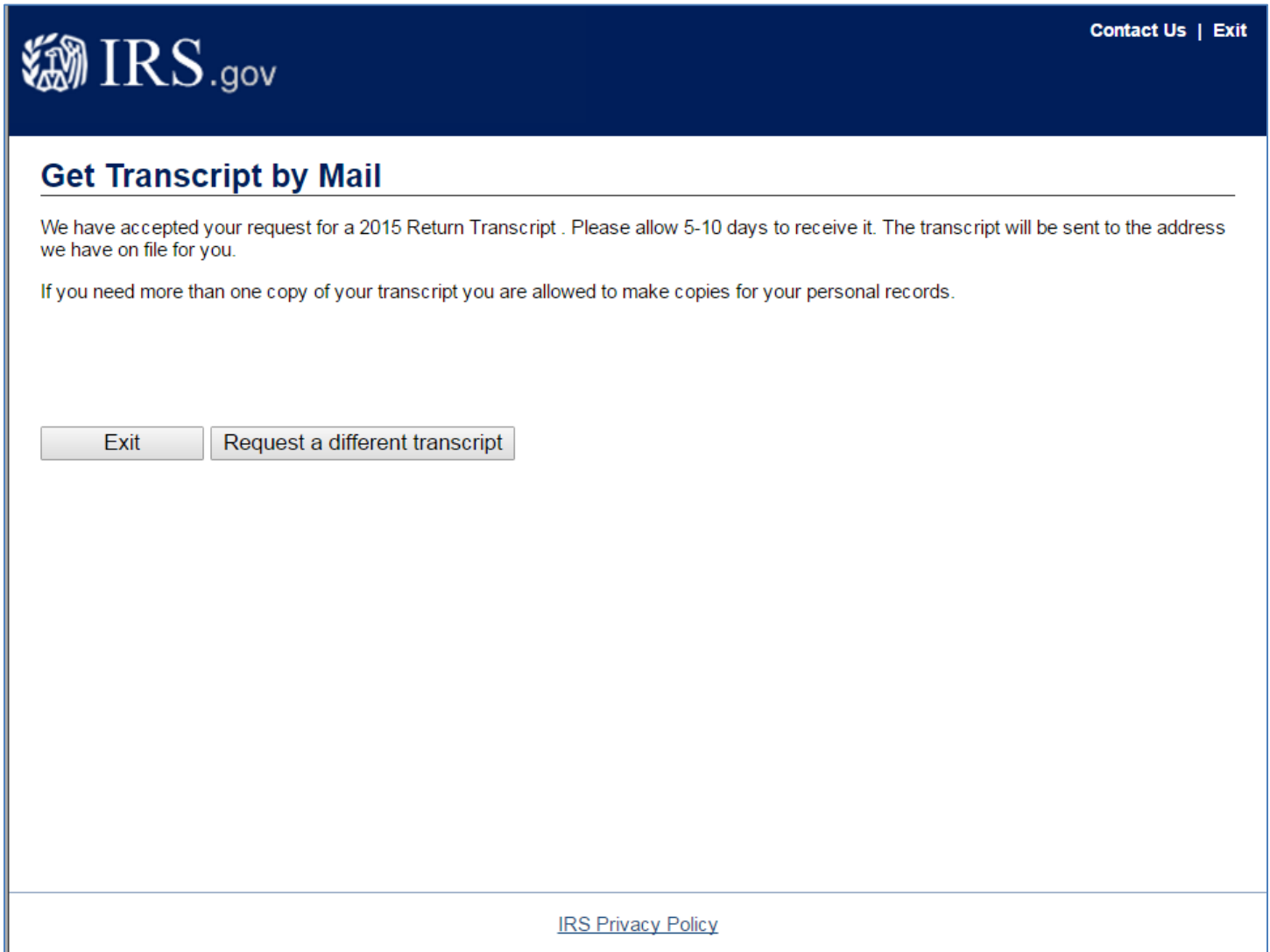
2015 ▼

[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 with a dark blue header. The IRS logo and '.gov' are on the left, and 'Contact Us | Exit' is on the right. The main heading is 'Get Transcript by Mail'. Below it, 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 line of text 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'. A footer at the very bottom contains the link 'IRS Privacy Policy'.

IRS.gov

Contact Us | Exit

Get Transcript by Mail

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.

If you need more than one copy of your transcript you are allowed to make copies for your personal records.

Exit Request a different transcript

[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.