IRS Tax Return Transcript Request Processes

Tax filers can request their 2017 Tax Return Transcripts free of charge from the IRS in one of following three ways:

Online Request

Visit **https://www.irs.gov/Individuals/Get-Transcript**

- Select **Get Transcript by ONLINE** button.
  - 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 Student Financial Aid office.
- **OR Get Transcript by MAIL** button.
  - Enter the Social Security # or Individual Tax ID #, DOB, Street Address & Zip or Postal Code of the Taxpayer and click Continue.
  - Select **"Return Transcript"** for the Type of Transcript, and select the **"2017"** for Tax Year, and click Continue.
  - If a record has been found, tax filers can expect to receive a paper 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 Financial Aid.

Telephone Request

Call 1-800-908-9946

- Tax filers must follow the prompts to enter their social security number, and the numbers in their street address. Generally this will be numbers in the street 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.
- Select **"Option 2"** to request a Tax Return Transcript; then enter **"2017"** to enter the year.
- If a record has been found, tax filers can expect to receive a paper 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.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

Using the IRS Data Retrieval Tool via the FAFSA

If you and/or your parent, if dependent, do not know your FSA ID, go to **https://fsaid.ed.gov/npas/index.htm** to "apply" for an FSA ID.

- Login to your FAFSA account at **www.fafsa.gov** with your FSAID
- Choose "Make a Correction" (2019-2020 FAFSA.)
- Navigate to Financial Information.
- Choose "Already Completed" when asked: "For 2017, have you completed your IRS income tax return or another tax return?"
- Choose your Tax Filing Status when asked: "For 2017, what is your tax filing status according to your tax return?"
  - For e.g.: Single, Head of Household, Married-Filed Joint Return, Married-Filed Separate Return, Qualifying Widow(er)
- Answer **"NO"** to the following questions:
  - "Did you file a Puerto Rican or foreign tax return?"
- Click "LINK to IRS"
- Click "OK" confirming you are leaving the FAFSA website.
- Click "OK" to access the IRS database *(Your Name should appear exactly as it does on the tax return including the middle initial, your SS#, DOB, Tax Filing Status & Country will also be pre-populated.)*
- Enter "Street Address (PO Box/Apt. # if applicable) **Enter this information exactly as it does on the tax return**
- Enter City, State & Zip
- Click "Submit"

*(**Dependent students will need to repeat these steps under the "Parent Financial Information" Tab**)*

If Taxpayer information is found tax information will be displayed.

- Check the box on the on the left side, then
- Click "transfer now" on the right side. To transfer the Tax information unto the FAFSA

(You will now be returned to your FAFSA)

DO NOT MAKE CHANGES TO THE INFORMATION WHICH HAS BEEN TRANSFERRED FROM THE IRS, OR ELSE YOU WILL NEED TO PROVIDE A PAPER TAX RETURN TRANSCRIPT FROM THE IRS.

Once back in your FAFSA account click next at the bottom of each page until you get to the signature page.

- Check the box: "agree" to sign the terms & conditions (***Dependent students will also need to complete this step for the parent***)
- Click submit FAFSA and print the confirmation page
- Exit and Logout of FAFSA.