

## **INSTRUCTIONS FOR OBTAINING TAX RETURN TRANSCRIPTS**

We have produced this helpful guide to assist parents and students with fulfilling the request for a Federal Tax Return Transcript. We hope you find the information useful.

### **1. IRS Data Retrieval**

Utilize IRS Data Retrieval tool on the FAFSA **OR** Provide 2015 Federal Income Tax Transcripts. \*Copies of the US Federal Income Tax Returns are NOT acceptable. \*

*Simple steps to transfer your Tax information into your FAFSA* <https://studentaid.ed.gov/sa/sites/default/files/transfer-tax-info-to-fafsa.png>

**Request a IRS DATA Retrieval to the FAFSA:** [www.fafsa.gov](http://www.fafsa.gov)

### **2. Get a mailed Transcript Online**

Joint Tax Return – When requesting a transcript using the electronic process described below, use the primary tax filer’s information (e.g., SSN).

- Under “Tools” select “Get Transcript of Your Tax Records.”
- Select “Get Transcript by Mail” NOTE: When you select “Get Transcript Online” or “Get Transcript by Mail” a popup window from the Government will appear telling you that this is an authorized site and use of the site constitutes consent to monitoring...etc. Read the message and hit OK.
- Enter your Social Security Number
- Enter your Date of Birth
- Enter your Street Address
- Enter your Zip or Postal Code
- Hit Continue
- Select “Return” transcript and the year and hit CONTINUE
- Allow 5-10 business days to receive your transcript by mail.

**Request a IRS Transcript by mail:** [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript)

### **3. Telephone Request**

You may request your tax transcript over the phone by calling the IRS. If successfully validated, you can expect to receive a paper IRS Tax Return Transcript at the address included in your telephone request within 5 to 10 business days from the time the IRS receives the request. IRS Tax Return Transcripts requested by telephone cannot be mailed to an address other than the address on file with the IRS.

Joint Tax Return – When requesting a transcript using the process described below, use the primary tax filer’s information (e.g., SSN).

- **To Request a Transcript by Phone: Call 1-800-908-9946**
- Press 1 to continue in English.
- Follow the prompts to enter your Social Security Number and the numbers in your street address. Select “Option 2” to request an IRS Tax Return Transcript and then enter “2015”.

### **4. Non Tax Files**

Individuals who did not file an IRS tax return for the relevant tax year will need to request a Verification of Non-filing (VONF) letter using IRS Form 4506-T. A VONF letter request is available through the link below.

Form 4506-T is required for parents and independent students that do not file taxes.

**Request a 4506 T Form online:** <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>

### **5. Individuals Who Were Victims of IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; *and*
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax related identity theft and that the IRS is aware of the tax-related identity theft.

**Identity Protection Specialized Unit 800-908-4490**