

IRS Tax Return Transcript Request Instructions

(For award year 2019-20)

The preferred method for supplying tax data on the FAFSA is to make a correction to the FAFSA and use the IRS Data Retrieval Tool to transfer the data directly from the IRS into the FAFSA. By doing this, we will receive the correction within a week of the submitted correction. Provided the transferred data was not changed after the transfer, we would then not require the tax transcripts which can take up to 10 days for you to receive from the IRS.

Notes about Requesting an IRS (1) **Federal Tax Return Transcript** or (2) **Record of Account Transcript**:

- You must use the address currently on file with the IRS. Generally this will be the address that was listed on the most recent 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.
- Tax filers should request the **2017** federal tax return transcript for the 2019-20 award year.
- Students and parents are unable to utilize the IRS Data Retrieval Tool if their tax filing status is:
 - Married Filing Separately
 - Head of Household
 - Filed an Amended Tax Return
 - Filed a Foreign Tax Return
 - Recently Filed (3 weeks for electronic filing, 11 weeks for paper filing)

Tax filers can request a Federal Tax Return Transcript, free of charge, from the IRS in one of the following ways:

Online Request

- Go to (www.irs.gov)
 - On the homepage, under the 'Tools' section, click on 'Get Transcript of Your Tax Records'
1. To Show Transcript Immediately:
 - Click on 'Get Transcript Online'. You must create or reactivate your account by following the screen prompts.
 - Sign into your IRS account.
 - Select the reason you are requesting a transcript as 'Higher Education/Student Aid'
 - Select '**2017**' under Return Transcript and a PDF of the tax filer's transcript should open, which can then be printed.
 2. To Receive Transcript by Mail
 - Click on 'Get Transcript by Mail'
 - Enter the tax filer's Social Security Number, date of birth, street address and zip code. Click 'Continue'
 - In the Type of Transcript field, select 'Return Transcript' and in the Tax Year field, select '**2017**'.
 - 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 after the request is submitted to the IRS.

Telephone Request:

- Call the IRS at 1-800-908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address.
- Select 'Option 2' to request an IRS Tax Return Transcript and then enter '**2017**'.
- If successfully validated, tax filers can expect to receive a paper IRS tax return transcript, at the address included in their phone request within 5 to 10 days after the request is submitted to the IRS.