How to Obtain a Free Tax Return Transcript from the IRS

Tax filers can request a transcript, free of charge, of their federal tax return transcript for the current academic year required from the IRS in one of four ways.

Methods:

1. Use IRS Data Retrieval Tool. Please click on the link below to watch a very informative 3 minute video on how to use the IRS tool. (This video is provided by UC Santa Barbara)

http://www.youtube.com/watch?v=9ZNRdk3iXeM

To successfully use the IRS Data Retrieval option you must:

- Have a federal tax return filed with the IRS (mailed longer than 8 weeks ago, or filed 3 weeks ago electronically).
- Have a valid social security number.
- Have a Federal Aid Personal Identification Number (PIN).

You will be NOT be able to use the IRS Data Retrieval option if:

- Your marital status changes after December 31 of the same tax year.
- You filed as "Married Filing Separately".
- You filed an amended tax return.
- You filed a foreign tax return.
- You filed your taxes within the last 8 weeks (or electronically within the last 3)

To update your FAFSA using the IRS Data Retrieval Tool, the following steps should be used:

1. Log into the FAFSA website at www.FAFSA.ed.gov.
2. Click on Start Here.
3. Click on Make Corrections.
4. Click on Financial Information Tab to bring you to the Parent/Student Tax Information.
5. Select Already Completed (allow 2-3 weeks from electronic filing date before using IRS Data Retrieval). Read through the list of statements and check "Yes" or "No". If all of the statements are correctly answered "No" then you will be able to use the IRS Data Retrieval Tool.
6. Enter your Pin and click on Link To IRS.
   Fill in the information as instructed. You MUST fill in your address exactly how it appears on your Tax Return Form. Click Submit and if done correctly the IRS data will appear.
7. Click on the option Transfer Now. Do not make changes to IRS data.
8. Review the Income Wages Earned from W2s, Business Income or Farm Income.
9. Sign with student Pin number (if dependent, parent pin is also required) and submit your FAFSA to update information.
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 Financial Aid Office. Personal copies of tax returns can no longer be accepted.

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 financial aid verification purposes.

2. **Printing Tax Return Transcript ONLINE:**

Students and parents may go online and print their transcripts by following this link: [http://www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript)

### 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 Student Financial Aid office**

3. **Telephone Request**

- **Available from the IRS by calling 1-800-908-9946**
- **Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.**
- **Select Option 2 to request an IRS Tax Return Transcript and then enter the year you are requesting.**
- **If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within five to 10 days from the time the IRS receives the request.**

4. **Visit a Local IRS Office**

- **If online and telephone requests are not available because of address changes or other errors, please visit a local IRS office to address the problem.**
- **Locate an IRS office through [www.irs.gov](http://www.irs.gov).**
- **Bring a form of photo identification & Request a Tax Return Transcript.**