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:

- Filed your federal tax return with the IRS. You can only use the tool if you do not owe taxes, or have submitted payment for your taxes to the IRS.
- Have a valid social security number.
- Have a Federal FSA Username and Password (if you do not have this information, you will be given the option to apply for one)

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

- Your marital status changed 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 a tax return using a Tax ID Number (TIN).
- The home address on the FAFSA does not match the address on the 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:

2. Click on Make Corrections.
3. Click on Financial Information Tab to bring you to the Parent/Student Tax Information.
4. 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.
5. 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.
6. Click on the option Transfer Now.
7. Please make sure to re-sign and re-submit the FAFSA. It will remain incomplete without this step.
8. In addition, you must **NOT** change any information that was transferred from the IRS otherwise the FAFSA will be considered invalid and consequently you will then be required to submit the Tax Return Transcripts.
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. **Ordering Tax Return Transcript online or by mail:**

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

   ***At this time, you can no longer print your transcripts online...***

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.
   - Bring a form of photo identification & Request a Tax Return Transcript.