How to Retrieve Your Tax Transcript from the IRS

If you have been asked to provide a **student and/or parent IRS Return TRANSCRIPT**, you can obtain an IRS Tax Return Transcript, **free of charge**, using one of the options below.

Option 1 - FAFSA Data Retrieval Option



- Go to fafsa.gov and log in using the student's FSA ID.
- Click on "Make FAFSA corrections".
- Go to the Financial Section tab of the FAFSA.
- There you will see the icon IRS Data Retrieval Tool (IRS DRT). There will be a series of questions you will have to answer to determine if you are eligible to use the IRS Data Retrieval Tool.
- **IF** you are able to answer "No" to the two questions, the following icon will appear LINK TO IRS
- If you are a dependent student and are trying to retrieve your parents' tax information, your parent will be asked to enter their FSA ID.
- You will then click LINK TO IRS
- You will then be notified that you are leaving FAFSA on the web and a government message will appear. Click ok.
- Follow the directions by completing the requested fields. **REMEMBER, enter** your **address exactly** the way you noted it on your tax return – if you have a PO Box, make sure to put just the box number in the appropriate field. Click on submit.
- If all data matches, you will see your tax information. In order to transfer the information to the FAFSA, check the box under "**Transfer My Tax Information into the FAFSA**" and click on "**Transfer Now**".
- If the transfer was successful, it will return to your FAFSA automatically and your income tax information will be populated. **You cannot make changes to any field with the notation "Transferred from IRS".** In order to submit the corrections, go to "Sign and Submit" section of your FAFSA, entering your FSA ID, and check the box to accept terms and conditions. **REMEMBER,** if the student is dependent**, both the student and the parent** need to enter **their FSA ID**, and accept terms and conditions to any corrections made in the FAFSA.
- After signing the application, click on "**SUBMIT MY FAFSA NOW**". It will submit your FAFSA with the corrections and you will be redirected to a confirmation page.

Option 2 – Submit signed copy of tax return

- You can submit a **signed** copy of your federal tax return that you filed with the IRS**. Electronic/typed signatures are not acceptable.**
- If the tax return copy includes a tax preparer name and PTIN number you do not need to sign the return.
- Please include a copy of all schedules filed with your return (worksheets do not need to be included).

Option 3– Get Transcript Online

- Go to the IRS Website at www.irs.gov
- You will see "**Get My Tax Record"** from the home page of the website. Click on it.
- Click on the "Get Transcript ONLINE" button in the blue colored box at the end of the Request Online section.
- If you are a **returning user**, log in with your credentials.

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- If you are a **first time user**, click on CREATE ACCOUNT and follow the instructions provided on each screen. In addition to your personal information, be aware that you will need an email address and a mobile phone in order to use this service. The IRS will also need to verify the information of one of your financial accounts, e.g. credit card, mortgage, home equity line or auto loan information. Be prepared to provide this information.
- After you are able to log in or authenticate your identity, you will be prompted to select a reason why you need a transcript. Select "*Higher Education/Student Aid*" and click on "Go".
- You should see different sections on the website, and under the **Return Transcript** section, click on the appropriate tax year, in this case, 2020. You should be able to view and download your return transcript. If you have a pop-up blocker, make sure you disable it to view the document. Once you have obtained it, you can submit your Tax Return Transcript to the Financial Aid Office.

Option 4 – Get Transcript by Mail

- Go to the IRS Website at www.irs.gov
- You will see "**Get My Tax Record".** Click on it.
- Click on the "Get Transcript by Mail" button in the blue colored box found at the end of the Request by Mail section.
- Click "OK" when you see the Government Message.
- You will need to provide the taxpayer's Social Security Number, Date of Birth, Street Address, and the Zip Code. After typing the information, click "Continue".
- Select "**Return Transcript**" in the Type of Transcript dropdown box and the appropriate Tax Year. Click "Continue".
- The IRS will send your Tax Return Transcript by U.S. Mail to the address they have on file within 5-10 calendar days.

Option 5 - Paper Request Form – IRS Form 4506-T-EZ

IRS Form 4506-T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.

- Download at **www.irs.gov/pub/irs-pdf/f4506tez.pdf**
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- On line 6, enter the tax year (i.e. 2020) to receive IRS tax information for the tax year that is required for the FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

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Email: finaid_off@fortlewis.edu
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