Instructions for Completing IRS Data Retrieval or Obtaining a Federal Tax Return Transcript

IRS Data Retrieval Directions:
- Go to FAFSA.ed.gov
- Click “making corrections to FAFSA”
- Scroll over to the financial information on the top of the page (parents and/or student)
- Look for the “link to IRS”
- Follow all prompts from there
- Sign FAFSA when finished with your PIN number
- Submit

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 Puerto Rican or Foreign Tax Return
- Recently Filed (Less than 3 weeks for electronic filing or 8 weeks for paper filing)

Obtaining a Tax Return Transcript:
Students and Parents have four options for providing Tax Return Transcript information to the Student Financial Services Office.

Option #1 - Request an Immediate PDF of Your Return

- Under the “Tools” section click “Get Transcript for My Tax Records.”
- To receive an immediate “Online” copy of your Return click “Get Online Transcript.”
- Click “Create an Account” if this is your first time logging into the website.

Provide your First Name and Last name
- Email Address.
- Click “Send Email Confirmation Code.”

***Retrieve your confirmation code by viewing your email in another browser window. Do not close the irs.gov window, or you will have to restart the process.***

***Be sure to use your code within 30 minutes or it will expire, and you will have to restart the process.***

- Enter your Confirmation Code.
- Click “Verify Email Confirmation Code.”
- Enter your Social Security Number.
- Date of Birth.
- Answer “Filing Status” Question.
Complete Address Information - you must use the exact address as it appears on your Tax Return.
- Phone Number (Optional).
- Decide whether or not to check the “checkbox.”
- Click “Continue.”
- Answer the Security Questions.
- Click “Continue.”
- Create a “Site Phrase and Site Image.”
- Create 4 “Security Questions.”
- Create a “User ID and Password.”
- Click “Submit.”

***Be sure you receive the message: Your profile was successfully created. Be sure to write down your User ID for future reference. Please click the "Continue" button to go to your selected application.

- Click “Continue.”
- Click the button for “Higher Education/Student Aid.”
- Click on the “Return Transcript” for 2014.

Print 2 copies of your Return Transcript- One for you to keep, and one to submit to the Student Financial Services Office.

***If there is an asterisk next to 2014, and you have filed your return, it means the IRS has not yet processed your Tax Return. You will need to log back into the website at a later date.

Option #2- Receive a Copy by Mail
Go to www.irs.gov
- Under the “Tools” section click “Get Transcript for My Tax Records.”
- Click “Get Transcript by Mail.”

Enter the following information for the PRIMARY TAXPAYER shown on your Tax Return:
- SSN
- Date of Birth
- Street Address- as it appears on the Tax Return
- Zip Code

Click “Continue” and Select:
- Type of Transcript: RETURN TRANSCRIPT
- Tax Year: 2014 (For the 2015-2016 Academic Year)

***If the IRS has processed your 2014 Return you will receive the following message:
We have accepted your request for a 2014 Return Transcript. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you.

Option #3- Call the IRS
Call 1-800-908-9946 and use the automated system to request a Tax Return Transcript.
You can expect to get your transcript within 10 days from the date of your request.

Option #4- Visit to your local IRS Office
Go to http://www.irs.gov/uac/Contact-Your-Local-IRS-Office-1 to locate your local IRS Office.
Be sure to bring proper identification with you.