

# IRS Tax Return Transcript Request Process

Tax filers can request a transcript, free of charge, of their “**2013**” tax return from the IRS in one of three ways.

- Please be sure to request a “IRS Tax Return Transcript” and not the IRS Tax Account Transcript

## Online Request

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov)
- In the **Tools** section of the homepage click “**Get Transcript for my Tax Records**”
- Click “**Get Transcript Online**”
- Create an Account
  - (**Step 1**) Name and Email Address
  - (**Step 2**) Enter confirmation code that was emailed to you
  - (**Step 3**) Personal information (name, email, social security, date of birth, filing status, address)  
Generally this will be the address that was listed on the latest 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.
  - Note: Please select the checkbox before clicking on the “continue button”**
  - (**Step 4**) Answer questions that will validate your identity
  - (**Step 5**) Click “Higher Education/Student Aid” and choose transcript year (**2013**)
  - (**Step 6**) Print

If you are unable to retrieve your tax transcript using this method, click on “**Get Transcript by Mail**” and follow instructions below:

- Enter the tax filer’s Social Security Number, date of birth, street address, and zip code. Use the address currently on file with the IRS.
  - Generally this will be the address that was listed on the latest 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.
- Click “Continue”
- In the **Type of Transcript** field, select “Return Transcript” and in the **Tax Year** field, select “**2013**”.
- 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 from the time the on-line request was successfully transmitted to the IRS.
- **NOTE:** IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

## 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 US Postal Service, the IRS may have the updated address on file.
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2013**”.
- Tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
- **NOTE:** IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

## In Person

- The IRS office is located at:  
410 Amherst Street  
3<sup>rd</sup> Floor Nashua, NH 03060  
603-594-8370 for hours

## IRS Data Retrieval Instructions for FAFSA

To verify income using the IRS Data Retrieval Tool that is part of FAFSA on the Web please follow these instructions.

1. Confirm that you are eligible to use the IRS Data Retrieval Tool. You are **not** eligible if:

You filed an amended tax return

If you're married but you and your spouse filed separate tax returns

All instances when the dependent student's legal parents are unmarried and living together

Your or your parent's marital status changed after December 31<sup>st</sup>, 2013

You filed a foreign tax return

2. To use the IRS Data Retrieval Tool:

Go to [www.FAFSA.gov](http://www.FAFSA.gov)

Log in to the FAFSA

Select "Make FAFSA Corrections"

Select the "Financial Information" tab, student or parent, as appropriate.

On the question regarding taxes filed, select "Already completed." This will bring up a series of questions to determine if you are eligible to use the IRS Data Retrieval Tool. If eligible, enter your PIN and click on "Link to IRS" button.

Once you are in the IRS website, you will need to enter your filing status and the address you used on your tax return. Select "Transfer My Tax Information into the FAFSA" and click "Transfer Now."

Once you have exited the IRS website and returned to the FAFSA website you will see the information that has been transferred.

3. **You will still need to answer the question(s) regarding your (and your spouse's) wages, if applicable.**
4. If you need to transfer additional IRS Data, then repeat the instructions above.
5. Make sure you sign the FAFSA with your PIN (and parent PIN, if dependent student) and submit.

If you need more information about when or how to use the IRS Data Retrieval Tool, contact the financial aid office.