

### 3 Options to Request IRS Tax Return Transcript

#### Option 1: IRS DATA Retrieval Tool on the FAFSA (Preferred Option)

Video, Step-by-Step Guide: <http://www.youtube.com/watch?v=9ZNRdk3iXeM>

- **Step 1:** Go to <http://www.fafsa.gov>
- **Step 2:** Select “**Login**,” and enter the student’s name, date of birth, and Social Security number.
- **Step 3:** Click on “**Make Correction**,” enter the student’s FAFSA PIN, and select a password.
- **Step 4:** If **Dependent**, continue through the screens to the “**Parent Financial Information**.” If **Independent**, skip to Step 5.
  - Answer the questions as prompted to determine if you are eligible to use the IRS Retrieval Tool.
  - Under the IRS Data Retrieval section, select “mother” or “father” and enter that parent’s FAFSA PIN.
  - Click on “**Link to IRS**.”
  - Enter the address and tax filing status exactly as it appears on the tax form. Click on “**Submit**.”
  - Review the tax information: **DO NOT change any data or it will not be considered “retrieved data.”**
  - Select “**Transfer my Tax Information in the FAFSA**” and click on “**Transfer Now**.”
  - Expect a message confirming that the information transferred.
- **Step 5:** Go to the “**Student Financial Information**” screen and answer the questions when prompted.
  - Under the IRS Data Retrieval section, enter the student’s FAFSA PIN.
  - Click on “**Link to IRS**.”
  - Enter the address and tax filing status exactly as it appears on the student’s tax form. Click on “**Submit**.”
  - Review the tax information but **DO NOT change any of data or it will not be considered “retrieved data.”**
  - Select “**Transfer my Tax Information in the FAFSA**” and click on “**Transfer Now**.”
  - Expect a message confirming that the information transferred.
- **Step 6:** Continue through the screens and select “**Submit**.”

*If successfully submitted, MBU will typically receive the results within 5 business days.*

#### Option 2: Print an IRS Tax Return Transcript Online

- **Step 1:** Go to the “Order a Transcript” section of the IRS website at <http://www.irs.gov/Individuals/Get-Transcript>
- **Step 2:** Follow the steps to create an account with the IRS by requesting the confirmation code.
- **Step 3:** Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal code.
  - Unless you have recently updated your address with the IRS, type in the address off of your return *exactly as it appears*.
  - Check the box if you DO NOT want to set up a User ID and password.
  - Click **Continue**.
- **Step 4:** In the **Type of Transcript** field, select **Return Transcript**. In the **Tax Year** field, select **2013**.

#### Option 3: Request a IRS Tax Return Transcript be Mailed to You

- **Step 1:** Go to the “Order a Transcript” section of the IRS website at <http://www.irs.gov/Individuals/Get-Transcript>
- **Step 2:** Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal code.
  - Unless you have recently updated your address with the IRS, type in the address off of your return *exactly as it appears*. Click **Continue**.
- **Step 3:** In the **Type of Transcript** field, select **Return Transcript**. In the **Tax Year** field, select **2013**.
  - If successfully validated, 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 IRS receives the request.