

## IRS TAX RETURN TRANSCRIPT REQUEST PROCESS

Tax filers can request a transcript, free of charge, of their “2014” tax return from the IRS in one of three ways.

Please be sure to request an “**IRS Tax Return Transcript**” and not the IRS Tax Account Transcript.

### ONLINE TRANSCRIPT 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**”.
- Click “**GET STARTED**” to **create a login** to verify your identity for access to your personal tax information.
- Enter your First Name, Last Name, and Email Address in Step 1 of 6 for your personal information.  
Click “**SEND EMAIL CONFIRMATION CODE**” which will bring you to Step 2 of 6 which is the Confirmation Code page. You will be sent a confirmation code to the email address you entered within 10 minutes. Check your spam folder if you do not receive an email.
- Enter the confirmation code in the space provided on the Step 2 of 6: Confirmation Code page of the IRS, and Click “**CONTINUE**”. You will be brought to the personal information page.
- Enter your information on the Step 3 of 6: Personal Information page. **The information you enter should match the information from your most recent tax return.**  
**Personal Information:** Enter your First Name, Last Name, Email address, Social Security Number, and Date of Birth. Under “Filing Status” you will select “I have filed a tax return in the past seven years” and click the arrow on the drop down menu to select your “filing status from your most recently filed tax return”.  
**Address:** Enter the address that was used on your most recent tax return. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.  
**Login Options:** Select either **Create a User ID and Password** (A User ID and Password will allow you to skip entering this information when you access the system) or **PROCEED AS GUEST** (Proceeding as guest will require you to enter this information every time you access the system). Click “**CONTINUE**” to be brought to Step 4 of 6: Personal Information to validate your identity.
- Answer the questions to validate your identity. This additional information will ensure that you are the right person. Once all questions are answered click “**CONTINUE**”, and you will be brought to Step 5 of 6.
- On the Step 5 of 6: Security Profile page complete the following steps:  
Enter a **USER ID and PASSWORD**. This can be any user ID and password of your choosing, as long as it matches the rules in the grey box to the right of the page.

**CREATE A SITE PHRASE and SELECT AN IMAGE** that you will recognize when you login.

**Answer the 4 Challenge Questions** by clicking the arrow on each field to select a question, and then enter your answer in the space provided beneath each question. Click “Continue” once finished.

- You will be brought to a page that states “Your User Profile was Successfully Created”. Click “**Continue**”.
- On the Get Transcript page, select a reason you need a transcript by clicking the arrow in the drop down box. Click “**Go**”. You will then want to click on 2014 in the return transcript box.
- **Print your Tax Return Transcript.**

### MAIL TRANSCRIPT REQUEST

- In the Tools section of the homepage click “GET TRANSCRIPT FOR MY TAX RECORDS”  
Click “GET TRANSCRIPT BY MAIL”.  
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. 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 “2014”.
- 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 TRANSCRIPT 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.  
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 “2014”.

- 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 TRANSCRIPT REQUEST**

410 Amherst Street 3rd Floor Nashua, NH 03060  
 603-594-8370  
 Monday-Friday - 8:30 a.m. - 4:30 p.m.  
 (Closed for lunch 1:00 p.m. - 2:00 p.m.)

## **FAFSA IRS DATA RETRIEVAL INSTRUCTIONS**

To transfer tax information 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)

If new to the FAFSA, click on "**Start a New FAFSA**" and proceed to the questions on the application.

If you have already filed, go under "**Returning User?**" select "**Make FAFSA Corrections**"

Enter your login information and click "**Next**"

Click on the "**Make FAFSA Corrections**" hyperlink

Enter your PIN number, enter your password, or create a new one.

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

On the question regarding taxes filed, select "**Already completed.**" If you can answer '**No**' to the following questions then you are eligible to use the Data Retrieval Tool:

- Did you file an amended tax return?
- Did you file a Puerto Rican or foreign tax return?
- Did you file electronically within the last 3 weeks or through the mail in the last 11 weeks?

If eligible to use the data retrieval tool, click on the '**Link to IRS**' button. If transferring parent tax information, enter parent's PIN then click '**Link to IRS**'.

Once you are in the IRS website, you will need to enter your address exactly as it is on your tax return then click '**Submit**'. Check the "**Transfer My Tax Information into the FAFSA**" box 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,**
4. 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.