

REQUESTING AN IRS TAX RETURN TRANSCRIPT

Tax filers can request an IRS Tax Return transcript from the IRS Office, free of charge, via web, telephone, or in person.

Federal regulations require the “IRS Tax Return Transcript,” not the “IRS Tax Account Transcript;” please ensure you request the correct transcript.

REQUESTING A TRANSCRIPT THROUGH THE IRS WEBSITE

ONLINE REQUEST:

- www.irs.gov
In the Tools section of the homepage select “GET A TAX TRANSCRIPT”
Select “GET TRANSCRIPT ONLINE” (Please make sure any pop-up blockers have been disabled.)
- To use the online request form, you will need the following: (1) your social security number and date of birth, (2) your filing status and mailing address from your latest tax return, (3) an email account, (4) your credit card number or an account number from an auto loan, mortgage, home equity loan or home equity line of credit, and (5) a mobile phone with your name on the account. If you choose to use a credit card number for identity verification it will not be charged.
- Record for future use the User ID and password you have selected before you press the “continue” button.
- You will be required to indicate the reason you need a transcript. Select “Higher Education/Student Aid” option.
- Select the year “**2015**” under the Return Transcript box.
- If your pop-up blocker is off, you will be shown a copy of your Tax Return Transcript, this is a pdf file. You can now print the file and we suggest you also save a copy to your computer/flash drive.

BY MAIL:

- www.irs.gov
In the Tools section of the homepage select “GET A TAX TRANSCRIPT”
Select “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.
Select “Continue”
In ‘**Type of Transcript**’ field, select “Return Transcript” and in ‘**Tax Year**’ field, select “**2015**”
- 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.

BY CALLING THE IRS:

- Call 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 “**2015**”.
- 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.

REQUESTING A TRANSCRIPT IN PERSON

Taxpayer assistance at the Nashua office is by appointment only. If you require a face-to-face meeting at this location, please contact **1-844-545-5640** to schedule an appointment.

410 Amherst Street 3rd Floor Nashua, NH 03060
Tel: 603-594-8370

Monday-Friday – 9:00 a.m. - 4:30 p.m.
(Closed for lunch 1:00 p.m. - 2:00 p.m.)

USING THE IRS DATA RETRIEVAL TOOL WITHIN THE FAFSA

To transfer tax information using the IRS Data Retrieval Tool within the FAFSA please follow these instructions.

ELIGIBILITY FOR THE IRS DATA RETRIEVAL TOOL

Please note: You are not eligible to use the IRS Data Retrieval Tool if:

- You filed an amended tax return
- You are married but you and your spouse filed separate tax returns
- All instances when the dependent student's legal parents are unmarried and living together
- You filed a foreign tax return
- You amended your tax return
- You filed electronically within the last 3 weeks or through the mail in the last 11 weeks

USING THE IRS DATA RETRIEVAL TOOL WITHIN THE FAFSA

- Log in to your FAFSA at www.FAFSA.ed.gov
Select "**Make FAFSA Corrections**"
Select the "**Financial Information**" tab and go to student or parent, as appropriate
Select on the '**Link to IRS**' button. (When transferring parent tax information, enter parent's FSA ID and PASSWORD not student's)
Once you have connected to the IRS website, enter your address exactly as it is on your tax return then click '**Submit**'
Select "**Transfer My Tax Information into the FAFSA**" and "**Transfer Now**".
Exit the IRS website and return to the FAFSA; you will see the information that has been transferred.
- **NOTE:** You must answer all question(s) regarding wages (yours and your spouse, if applicable, and parents', if applicable).
- **Sign and Submit the FAFSA (you and parent, if dependent student)**

If you need assistance using the IRS Data Retrieval Tool, please contact the financial aid office.