

Ordering Tax Return Transcripts

How Do I Know if I Need to Order Tax Return Transcripts?

You will need to order a free tax return transcripts for any of the following:

- You were selected for verification, used the IRS Data Retrieval Tool, and **changed the imported data** on the FAFSA
- You were selected for verification and **could not or did not use the IRS Data Retrieval Tool**. You would not have been able to use the Data Retrieval Tool if you filed:
 - Married, filing separately,
 - Married, head of household,
 - An amended tax return,
 - A foreign tax return, OR
 - Have a change in marital status after December 31, 2014

Please Note: If you can use the IRS Data Retrieval Tool but choose not to at the time, you can log back into your FAFSA and use the Data Retrieval Tool rather than submit a Tax Return Transcript.

How Do I Order My Tax Return Transcripts?

You have three options to obtain your tax return transcripts:

1. Download it online at the IRS website: [Get Transcript](#)
*up blockers in order to download**
2. Order by mail online at the IRS website: [Get Transcript](#)
3. Order by phone at 1-800-908-9946

**be sure to disable pop-*

I'm Having Issues With My Address or Security Questions While Ordering Online, What Now?

The address matching/security system used by the IRS to log in to their site is very picky and it must match the information on file with them exactly. **The address is usually what was on your last taxes. We suggest that you have your taxes in front of you to copy that address carefully.** For example, spelling out the word "street" rather than using the abbreviation "st." can be enough to cause an error in their system.

If you get locked-out or need help, the IRS.gov Website Help Desk can be reached toll-free at 1-800-876-1715, Monday - Friday 8:00 a.m. - 8:00 p.m. (Eastern Time).

When Can I Order My Tax Return Transcripts?

The timing of when you can successfully request a copy of your Tax Return Transcripts depends on if you owe taxes at the time of filing, and if you filed electronically or by paper. See below for more details.

	<u>Electronic Filing</u>	<u>Paper Filing</u>
Filer who either did not owe an amount, or is expecting a refund	2-3 weeks after submission in most cases	8-11 weeks later in most cases
Filer who owed an amount, and made a full payment <i>while</i> filing	2-3 weeks after submission in most cases	IRS will start processing the tax return in <i>June</i> , Tax Return Transcript requests can be made successfully 2-3 weeks later in most cases
Filer who owed an amount, and made a full payment <i>after</i> filing	3-4 weeks after the payment is processed by the IRS in most cases	IRS will start processing the tax return in <i>June</i> , Tax Return Transcript requests can be made successfully 2-3 weeks later in most cases
Filer who owed an amount, and have not yet paid in full	IRS will start processing the tax return in <i>May</i> , Tax Return Transcript requests can be made successfully 2-3 weeks later in most cases	IRS will start processing the tax return in <i>June</i> , Tax Return Transcript requests can be made successfully 2-3 weeks later in most cases

Who Can Order the Tax Return Transcripts?

Only **the first person that was listed on the federal tax returns** can order a transcript.

How Much Does it Cost?

It is **free** to order or view a tax return transcript.

How Long Does it Take to Receive My Tax Return Transcript?

Please see the section above that details when a request can be made as all requests must be made after the appropriate waiting period before they can be made successfully. **Requests to view the transcript online can fulfilled immediately** if all requirements are met. Requests made via the online order and phone options take an average of 5-10 days to be filled if all requirements are met.

What is a Tax Account Transcript?

While ordering, you may notice the option to request a tax account transcript. Please note **that this will not satisfy the requirement**, you must order a tax return transcript.

Can I Just Send a Copy of My Tax Returns?

The U.S. Department of Education **no longer accepts a tax return for verification purposes**. The only exception is if you filed amended tax returns (see below).

I Filed Amended Tax Returns, What Do I Do?

If you filed an amended tax return, you will need to submit a signed copy of your original IRS Form 1040 or a Tax Return Transcript, AND a signed copy of your IRS Form 1040X.