How to Request an IRS Tax Return Transcript

If you have been selected for verification by the U.S. Department of Education, New Jersey Higher Education Student Assistance Authority or Monmouth University, you may need to document the income you earned in 2014. To meet this requirement you can either: (1) update your FAFSA using the IRS Data Retrieval Tool (DRT); or (2) provide a copy of the IRS tax return transcript for your 2014 federal income tax return.

To use the Data Retrieval Tool method:

It is recommended that you wait 3 weeks after filing an electronic tax return and 11 weeks after filing a paper return before attempting to use the IRS DRT. To use the IRS DRT:

- Log into your FAFSA at [www.fafsa.gov](http://www.fafsa.gov), using student’s name, Social Security number, date of birth and PIN.
- Return to the student and/or parent “Financial Information” sections and answer the filtering questions.
  - If any of the following apply, you are ineligible to use the DRT:
    - a recent change in marital status
    - a tax return filing status of “married filing separately”
    - marital status of married and filing status of “head of household”
    - marital status of “unmarried and both parents living together”
    - filing an amended return
    - filing a Puerto Rican or foreign tax return
- If you are eligible to use the DRT, click on “Link to the IRS” and provide the requested identifying information. Enter the information exactly as it appears on your tax return.
- After the IRS has validated your identity, your tax data will be displayed. DO NOT make changes to any of the IRS data prior to importing it.
- Questions that have been answered by the IRS DRT will be marked with “Transferred from the IRS.”

To view and print an IRS Tax Return Transcript

- In the Tools section, click on “Get Transcript of Your Tax Records.”
- Click on “Get Transcript ONLINE.”
- First time users will have to set up an account. There are 6 steps in the process. Follow the instructions on each screen. You will need your name, email address, Social Security number or individual tax ID number, date of birth, filing status, and address. You will be asked about information on your credit report and will have to set-up four security questions.
- Establish your user ID and password.
- On the “Get Transcript” screen, choose “Higher Education/Student Aid” as the reason for your request.
- The “Return Transcript” will be suggested. Choose the year 2014.
- Your transcript should then display on the screen. Print it and be sure to sign out when you are finished.

Other Options

The fastest way to get your tax return transcript is to view and print it as described above. If you are unable to complete the online printing process or would like an option that does not require a computer, please see below.

Online Request – Get Transcript by Mail

- In the Tools section, click on “Get Transcript of Your Tax Records”
- Click on “Get Transcript by MAIL.”
• Acknowledge the disclosure pop up box that appears by clicking “OK.”
• Enter the primary tax filer’s Social Security Number, date of birth, street address (used on tax return) and zip code.
• Click “Continue.”
• In the **Type of Transcript** filed select “Return Transcript” and in the **Tax Year** field select 2014.
• The transcript will arrive by mail in 5-10 calendar days.

**IRS2Go App Request – Get Transcript by Mail**


**Phone Request**
- Call the IRS at 800-908-9946.
- Select language.
- Enter and verify Social Security Number.
- Enter and verify numbers in the street address (used on tax return).
- Select option “2” to request a tax return transcript and then enter “2014.”
- The transcript will arrive by mail in 5-10 calendar days.

**Frequently Asked Questions**

**Why can’t I just give you a copy of my federal income tax return?**
- The U.S. Department of Education now requires income verification directly from the IRS either through the Data Retrieval Tool or a tax return transcript.

**What type of transcript should I request?**
- Make sure to request the “IRS Tax Return Transcript.”

**Can I get a copy of my transcript at my local IRS office?**
- No. IRS offices no longer offer transcript printing services.

**What is the deadline to submit verification documents?**
- Please submit the documents as soon as they are available. The student’s financial aid package is not finalized until all requested documentation is received and reviewed.

**I filed a joint tax return but now I’m separated or divorced. What should I submit?**
- Submit the joint 2014 tax return transcript along with all W-2s for each tax filer.

**I filed an amended tax return, what do I need to submit?**
- Submit a signed copy of the original 2014 tax return that was filed with the IRS or the 2014 IRS tax return transcript and a signed copy of the 2014 IRS form 1040X Amended U.S. Individual Income Tax Return that was filed with the IRS.

**I owe a tax liability for 2014 and the IRS will not release my tax return transcript. What should I do?**
- Pay your tax liability as soon as possible and then request the transcript. Tax returns with a balance due will not be processed by the IRS until May, 2015.

**I lost my W-2. What should I do?**
- Contact your employer for another copy.