

IRS Tax Return Transcript Request Methods

As of April 24, 2017, Federal regulation allows the use of a signed copy of a federal income tax return for student aid verification. There are two acceptable methods to provide federal tax data to the Financial Aid Office. Choose either Method 1 or Method 2 (outlined below).

METHOD 1

Federal Income Tax Return

1. Submit a signed and dated copy of your 2015 Federal Income Tax Return to the Financial Aid Office.

METHOD 2

IRS Tax Return Transcript

Request Online

Note: To get a transcript online, you must have access to a valid e-mail address, a text-enabled mobile phone (pay as you go plans cannot be used), and specific account numbers such as credit card, home mortgage or auto loan. You will also want your Federal Tax in front of you as the address has to be EXACTLY how it appears on your taxes.

1. Go to www.irs.gov
2. Under Tools click “*Get a Tax Transcript*”
3. Click “*Get Transcript Online*” and click “*Get Started*” to create a login OR login if you have created one in the past. If you are unable to access an online transcript, you will need to request a transcript by mail and follow the prompts.
4. After you successfully verify your identity and created a secure user profile OR are logged in, click continue.
5. Select “Higher Education/Student Aid” as the reason you need a transcript.
6. Under “*Return Transcript*” select “2015,” you will be able to print it out if you can request it online.
7. Once you get the transcript, submit it to the Financial Aid Office.

Request by Phone

1. Call 1-800-908-9946
2. Wait for the prompt that asks you for your Social Security Number and Address (as currently on file with the IRS)
3. Select “Option 2” to Request an IRS Tax Return Transcript and then enter “2015” for the year.
4. Once you receive it in the mail, submit it to the Financial Aid Office.