REQUESTING A TAX RETURN TRANSCRIPT
Go to www.irs.gov and under “Tools” click Get Transcript for My Tax Records
Choose to “Get Transcript Online”

Get a record of your past tax returns, also referred to as transcripts. IRS transcripts are often used to validate income and tax filing status for mortgage applications, student and small business loan applications, and during tax preparation.

You can download and print your transcript immediately, or request the transcript be mailed to your address on record.

- View and print your transcript immediately.
- Choose among Tax Return, Tax Account, Record of Account, or Wage and income transcripts or a Verification of Nonfiling Letter.
- Need help? More information about Get Transcript Online.
You will need a Log-In and Password to access your transcript. If this is your first time, you will need to create an account. If you've already created an account, you can go ahead and sign in.

Fill in the required fields, and click **Send Email Confirmation Code**. The IRS will send a confirmation code to the email you provided.
Check email to retrieve the Confirmation Code. Put in the Confirmation Code and click **Verify Email Confirmation Code**. IMPORTANT: the code will expire within 30 minutes of requesting the code.

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**Sign Up: Step 2 of 6**

Retrive your confirmation code by viewing your email in another browser window. Do not close this window, or you will have to restart the process.

All fields are required. Do not close or navigate away from this page until your registration is complete. Please click the 'Verify Email Confirmation Code' button at the bottom of the page to continue.
Complete the Personal Information fields and click **Continue**. If you want this information stored so you don’t have to type it in each time you access a transcript, **DO NOT** check the box before clicking **Continue**. Otherwise, if you check the box, you will have to type this information in each time you request a transcript.

**Personal Information**

- **First Name**
- **Last Name**
- **Email**

**Social Security Number (SSN) or Individual Tax ID Number (ITIN)**

**Date of Birth**

- **Month**
- **Day**
- **Year**

**Filing Status**

- I have filed a tax return in the past seven years
  - [ ] Select Status
- I have not filed a tax return in the past seven years

**Country**
- United States

**Address Line 1**

**Address Line 2 (Optional)**

**City**

**State/U.S. Territory**

**Zip Code**

**Phone Number (Optional)**

**Mobile Number (Optional)**

Select checkbox and click the “Continue” button to proceed as guest. Proceeding as a guest user will require you to enter this information every time you access the system. If you would like this information stored for future use, do not check the box. Click the “Continue” button to create a User ID and password.
The next page will ask you a series of questions regarding to your credit. They are very specific and you must answer them correctly.
Create a phrase and select an image. The Site Phrase and Image will appear every time you log into your account.

Site Phrase and Site Image

Create a Site Phrase and select a Site Image that you will recognize whenever you sign in. The IRS will never ask you to log in without presenting the Site image and Site phrase that you select.

Site Phrase

Site Image
Choose 4 questions and answer each accordingly. These questions will be used to help you retrieve your username or password if you forget them.

Question

Answer Rules
- The same answer can not be used more than once.
- The answer can not be a word or number that is part of the secret question.

Question 1
Answer 1

Question 2
Answer 2

Question 3
Answer 3

Question 4
Answer 4

User ID and Password

User ID (cannot be an email address, SSN or contain a space or @)

Password Rules
- Password must be at least 8 characters long.
- Password must contain at least one numeric and one special character (t@#$%&*_-)
- Password must have at least one uppercase and at least one lowercase letter.
- Password cannot be the same as the User ID.

Password

Re-enter Password

Create a User ID and Password. The ID and Password must follow the rules indicated.
Press Submit
Once your ID and Password have been accepted, you will get to this page. You will also receive a confirmation email from the IRS. Click **Continue**

**User Profile Successfully Created**

Your profile was successfully created. Be sure to write down your User ID for future reference. Please click the "Continue" button to go to your selected application.

**Note:** All future correspondence will be via email.

[CONTINUE]
Select a reason why you are requesting a transcript. You will want to choose the first option, “Higher Education/Student Aid.” Once you select that option, the site will suggest you download a Return Transcript; a green box will appear around the available years to request that transcript. Click the transcript year that you are requesting.

Get Transcript

Please select the reason you are requesting a transcript to help us determine the appropriate transcript for your needs.

- Higher Education/Student Aid
- FEMA/Disaster Related
- State Licensing
- Income Verification
- Small Business Loan
- Health Care
- Housing Assistance
- Other

You selected: Higher Education/Student Aid
We suggest you download: Return Transcript

Below are the transcripts and years available.

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* The “Verification of Non-Filing” letter provides proof from the IRS that you did not file a return for the year you have selected.
If you have a pop-up blocker on your browser, make sure you click **Allow once**. This brings up a new window with your tax transcript.
This is what your Tax Return Transcript should look like. Please print or save it, then turn it into your Financial Aid office so they can process your Financial Aid Award.