Requesting a Tax Return Transcript Online

The U.S. Department of Education has selected the student for a process known as “Verification” and additional documentation must be submitted. You can request a Tax Return Transcript from the IRS at [https://www.irs.gov/](https://www.irs.gov/).

How do I request the Tax Transcript?

1. The taxpayer must go to [https://www.irs.gov/](https://www.irs.gov/) and click on “Get Your Tax Record”.

2. Scroll down and click on “Get Transcript Online”.

[Image of IRS website]
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3. If you already have an IRS account, enter your Username and click “LOG IN.” You will need to enter your password and a confirmation code that will be sent to your mobile phone or email. Then skip to step 18.

If you do not have an account, click on “CREATE ACCOUNT.”
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4. Click on “CONTINUE.”

You will need to register in order to use this service

Registration is

- Fast: Signing up only takes about 15 minutes
- Secure: Only you will have access to your tax information
- Convenient: you will only need to verify your identity once
- Free: There is no charge to sign up (Message and data rates may apply to send a security code to your mobile phone)

Before we get started, we’re going to ask you some simple questions to make sure you have everything you need.

CONTINUE
5. Click on “YES.”

You will need some information about yourself to register

Please have the following information and materials to complete registration:
- Full Name
- Email
- Birthdate
- Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
- Tax filing status
- Current address

Do you have this information available?

6. Click on “YES.”

You need a financial account to register

To verify your identity, we will need a number from ONE of your financial accounts. We can use any of the following:
- Credit Card OR
- Student Loan OR
- Mortgage or Home Equity Loan OR
- Home Equity Line of Credit OR
- Auto Loan

You will only need to provide the loan account number or a few digits from a credit card number. We only use this information to verify your identity. You will not be charged any money and are not sharing any account balances or other financial information with us.

A soft inquiry will show up on your credit report to let you know that the IRS accessed your credit report information. This will not increase or decrease your credit score and lenders will not be able to see this.

Do you have this financial information available? (If you don’t have the account information on hand, you should answer ‘No’.)

Help | IRS Privacy Policy | Security Code Terms and Conditions | Accessibility
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7. Click on “CONTINUE.”

You need a phone number or a verified address

We’ll need one more way to verify your identity. The easiest way is to send a code to your phone by text message (SMS). Your phone must be a U.S.-based mobile phone number associated with your name.

You can also complete identity verification by receiving a letter in the mail. If you choose this method, you’ll either need a U.S.-based phone number or an iPhone, iPad, or Android device to complete registration.

Exit Registration

8. Enter your First Name, Last Name, your Email address, and then click “SEND CODE.”

Let’s Get Started!

It sounds like you have all the necessary information available and can begin.

First Name (as it appears on your most recent tax return)

Last Name (as it appears on your most recent tax return)

Email Address

Confirm Email Address

A confirmation code will be sent to your email address. You will need to get the code and enter it on the next screen.

SEND CODE

CANCEL
9. Check your email for a confirmation code sent by the IRS. The email will look similar to the one provided in the example below.

Confirmation Code: Verify your email address

This message is from a trusted sender.

IRS.online.services@irs.gov

To set up your IRS account, verify your email address. Enter the following code on the IRS registration web page. This code is valid for 15 minutes.

Your confirmation code is:

$608-7501

About this message:
We've sent you this automated email because you requested an IRS account. For your security, the IRS will never contact you for personal or financial information in an email. Please do not reply because we are not able to respond to messages sent to this email address.

10. Enter the code from the email on the IRS website and the click “CONTINUE.”
11. Enter your First Name, Last Name, Date of Birth, Social Security Number, Tax Filing Status, and Address information. When everything has been entered click “CONTINUE.”
12. Click the appropriate circle for the account that you have and enter in the account information based on your selection. Then click “Continue”.

Verify your financial account number

To prevent identity theft and protect the security of your tax information, you will need to verify your identity.

Provide one of the following active account numbers:

- Last 8 digits of credit card
- Student loan account number
- Auto loan account number
- Mortgage or home equity loan account number
- Home equity line of credit account number
- Don’t have a current credit card, student loan, auto loan, home equity loan, or mortgage

By providing financial account information, I authorize the IRS to access my credit report for the purpose of verifying my identity.
13. You will need to enter in a mobile phone number and then click “SEND MESSAGE.” If you do not have access to a mobile phone there are other options listed at the bottom of the page.

14. Once you receive the text on your phone enter the code and then click “CONTINUE.”
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15. Create a Username and Password. Confirm or edit your email address. Choose a Site Phrase.

16. Choose a Site Image you will recognize when you log in, then click “CONTINUE.”
17. Click on “CONTINUE.”

18. For the reason choose “Higher Education/Student Aid,” then click “GO.” (You do not need to enter a Customer File Number.)
19. Under “Return Transcript” click the Tax Year you want. For the 2020-2021 FAFSA you should choose 2018. For the 2021-2022 FAFSA you should choose 2019. If you need W2 or 1099 information you can click on “Wage and Income Transcript.”
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20. Your tax transcript will then pop up in a new window and you will be able to download a pdf. The Tax Return Transcript should look like the example below, most will be 3-5 pages or longer. Sign out of the IRS website when you are done. Submit a copy of all pages to the Financial Aid Office. For NIU here is how it can be submitted: https://www.niu.edu/financial-aid/help/secure.shtml

![Internal Revenue Service
United States Department of the Treasury](image-url)

This Product Contains Sensitive Taxpayer Data

Request Date: 06-02-2018
Response Date: 06-02-2018
Tracking Number: XXXXXXXXXXX
Customer File Number: 7280844145

Tax Return Transcript
SSN Provided: XXX-XX-AAAA
Tax Period Ending: Dec. 31, 2017

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

NAME(S) SHOWN ON RETURN: JENS
ADDRESS: 4041 P

FILING STATUS: Single
FORM NUMBER: 1040EZ
CYCLE POSTED: 20182105
RECEIVED DATE: May 19, 2018
REMITTANCE: $0.00
EXEMPTION NUMBER: 0