



# Instructions on How to Obtain a Tax Return Transcript

If you are unable or chose not to use the IRS Data Retrieval Tool (DRT), you may submit a **2016 IRS tax return transcript** or a **signed copy of your 2016 Federal 1040 Tax Return**.

## Tax Return Filers choose ONE of the following:

### IRS Tax Return Transcript Online:

To obtain an IRS tax return transcript go to **www.IRS.gov** and click on the “**Get Transcript for My Tax Records**” link under the “Tools” bar. This will take you to “Get Transcript” Click on “**Get Transcript ONLINE**”. You will need to create an account initially, by providing your name, email, the address on file with the IRS (normally this will be the address used when the 2017 IRS tax return was filed), SSN, and answering security questions. Click on the “**Higher Education/Student Aid**” button. The screen will suggest that you get a tax return transcript. You can click on the appropriate aid year that is hyperlinked and a PDF will open in the same screen. From there you may print your tax return transcript.

### IRS Tax Return Transcript by Mail:

You may get a paper tax return transcript mailed to you by going to **www.IRS.gov** and click on the “**Get Transcript for My Tax Records**” link under the “Tools” bar. This will take you to “Get Transcript” click on “**Get Transcript by MAIL**”. From there you will be asked to enter your SSN, date of birth and the address on file with the IRS (normally this will be the address used when the 2016 IRS tax return was filed).

### IRS Tax Return Transcript by Phone:

If you do not have internet access, you may call **1-800-908-9946**. Make sure you order the “IRS tax return transcript” and not the “IRS tax account transcript.” You will need your SSN, date of birth, and the address on file with the IRS (normally this will be the address used when the 2016 IRS tax return was filed).

## Non-Tax Filers:

### Verification of Non-Filing Letter

You and/or your spouse are required to provide Verification of Non-Filing Letter from IRS that indicates a 2016 IRS income tax return was not filed with the IRS. You can request this by visiting the IRS website at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript). Please attach letter(s) from the IRS to this worksheet.

## Important Notes:

- If you and/or your spouse filed an amended IRS income tax return for tax year 2016 you must provide:
  - A **2016 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
  - A signed copy of the 2016 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.
- If you are married, and filed separate 2016 tax returns, 2016 IRS tax return transcripts must be submitted for both.