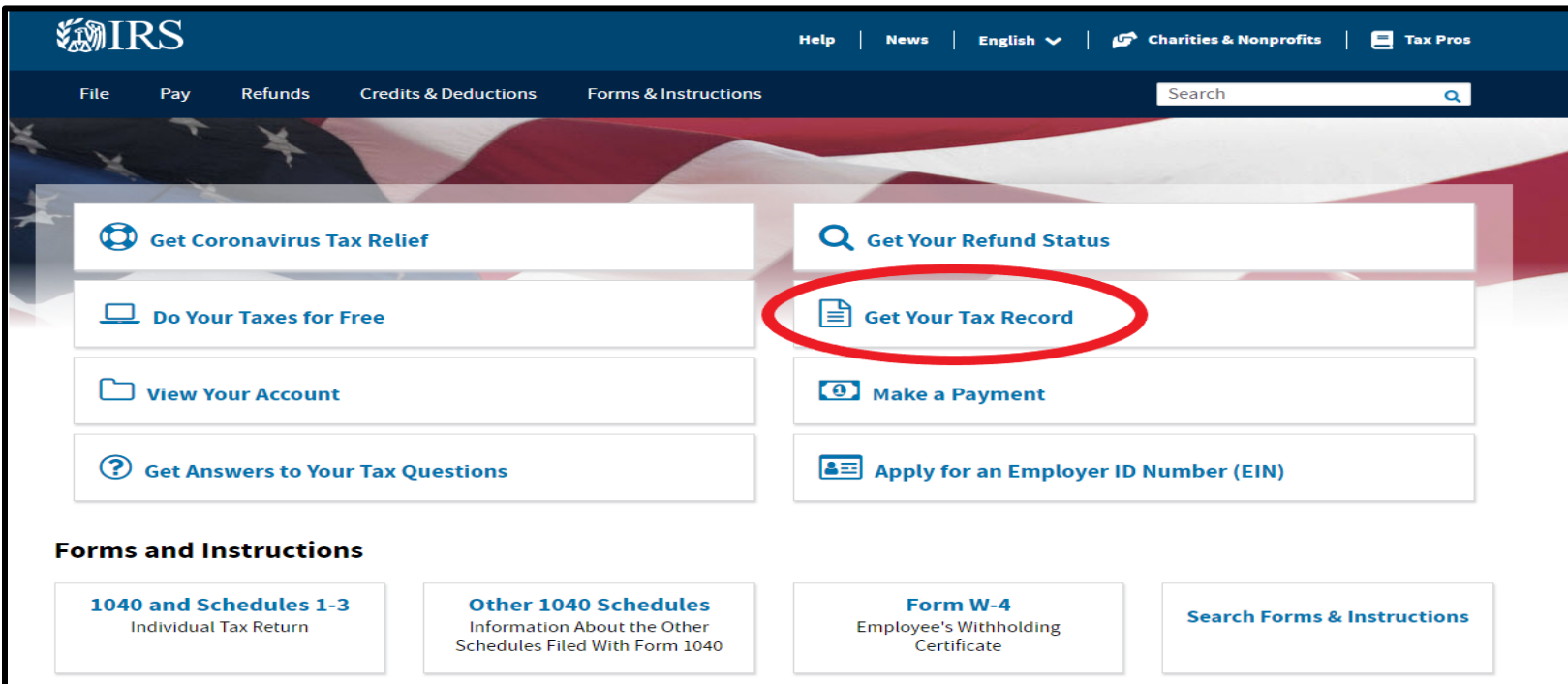


Requesting a Tax Return Transcript Online

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/>.

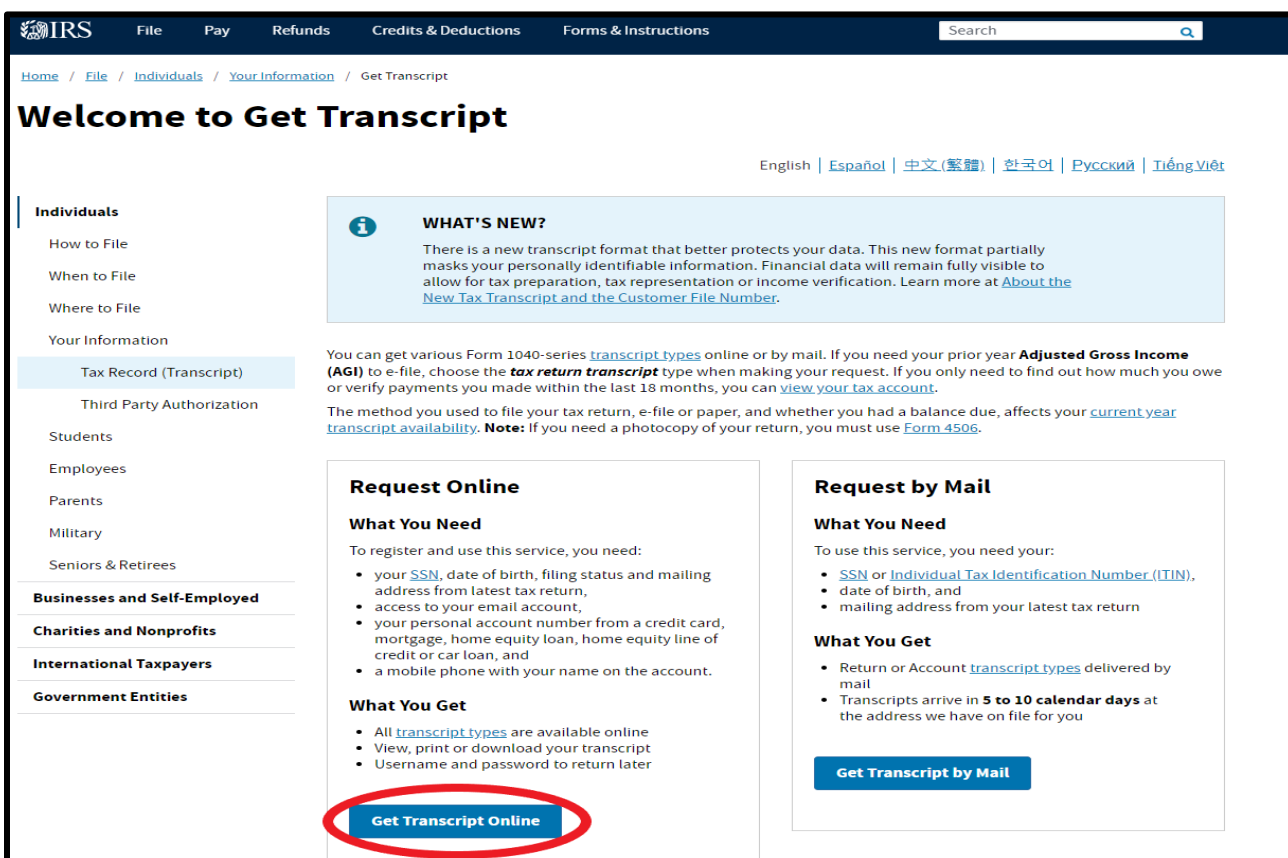
How do I request the Tax Transcript?

1. The taxpayer must go to <https://www.irs.gov/> and click on “Get Your Tax Record”.



The screenshot shows the IRS homepage. The navigation bar includes 'File', 'Pay', 'Refunds', 'Credits & Deductions', and 'Forms & Instructions'. A search bar is located on the right. The main content area features several service tiles. The tile for 'Get Your Tax Record' is circled in red. Other tiles include 'Get Coronavirus Tax Relief', 'Do Your Taxes for Free', 'View Your Account', 'Get Answers to Your Tax Questions', 'Get Your Refund Status', 'Make a Payment', and 'Apply for an Employer ID Number (EIN)'. Below these are sections for 'Forms and Instructions' with links for '1040 and Schedules 1-3', 'Other 1040 Schedules', 'Form W-4', and 'Search Forms & Instructions'.

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



The screenshot shows the 'Get Transcript' page on the IRS website. The page title is 'Welcome to Get Transcript'. The left sidebar lists various categories, with 'Tax Record (Transcript)' selected. The main content area includes a 'WHAT'S NEW?' section, a 'Request Online' section, and a 'Request by Mail' section. The 'Request Online' section has a 'Get Transcript Online' button circled in red. The 'Request by Mail' section has a 'Get Transcript by Mail' button. The page also includes a search bar and a language selection menu.

Requesting a Tax Return Transcript Online

- 3. If you already have an IRS account, enter your Username and click “LOG IN.” You will need 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.”

The screenshot shows the IRS website's login and registration interface. At the top left is the IRS logo. Below it, the 'Sign Up' section includes the text 'Don't have an account? Create one now.' and a blue button labeled 'CREATE ACCOUNT >' which is circled in red. To the right, the 'Log In' section includes the text 'Already have a username? Welcome back!', a 'Username' label, an empty text input field, a blue button labeled 'LOG IN >', and a link for 'Forgot Username'. Below the login section, a note states 'PTIN and FIRE users need a separate account in this system'. At the bottom, a warning message reads: 'WARNING! By accessing and using this government computer system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of, or access to, this computer system may subject you to criminal prosecution and penalties.' Below the warning are links for 'Help', 'IRS Privacy Policy', 'Security Code Terms and Conditions', and 'Accessibility'.

Requesting a Tax Return Transcript Online

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 >

[Help](#) | [IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

Requesting a Tax Return Transcript Online

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?

YES >

NO

[Help](#) | [IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

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'.)

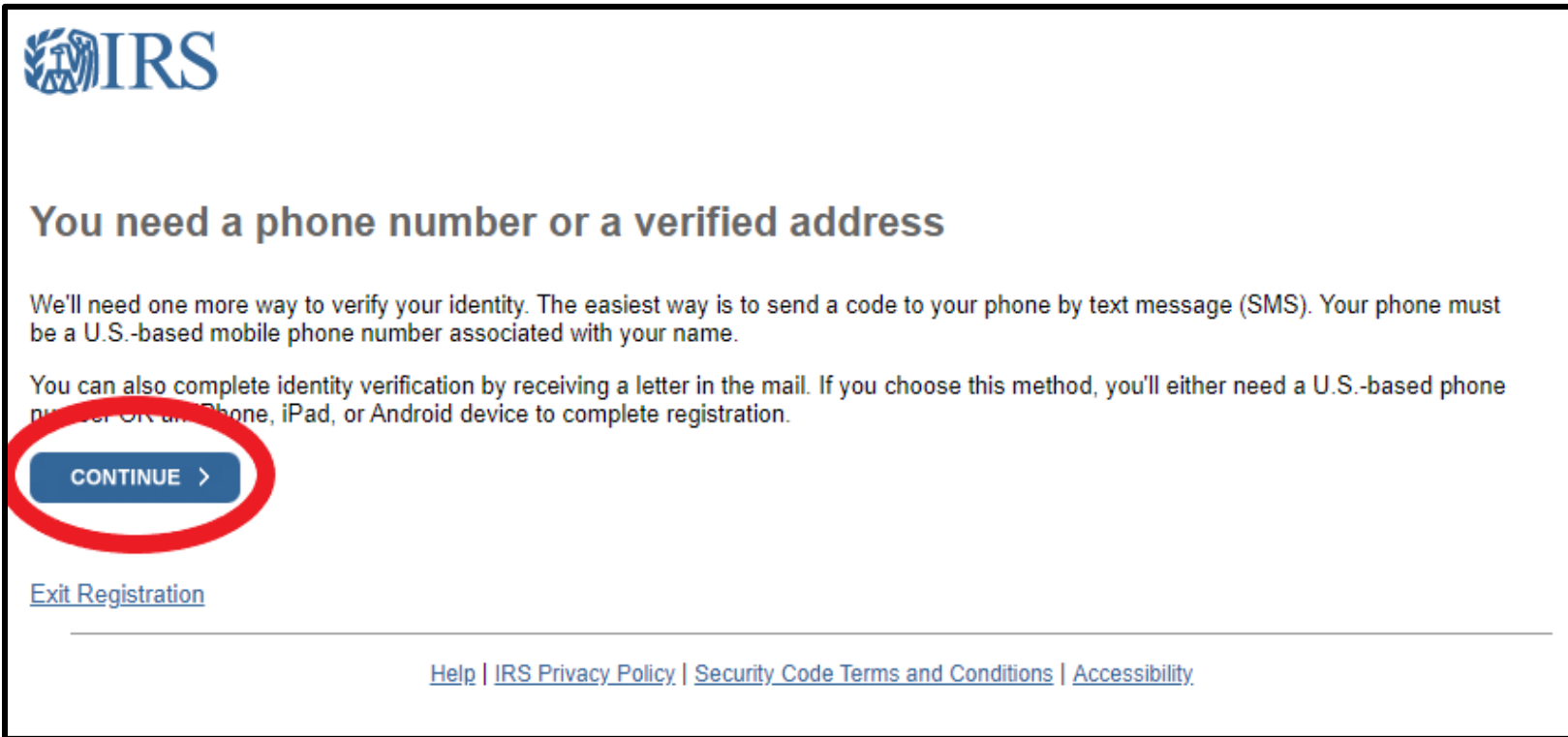
YES >


NO

[Help](#) | [IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

Requesting a Tax Return Transcript Online

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.

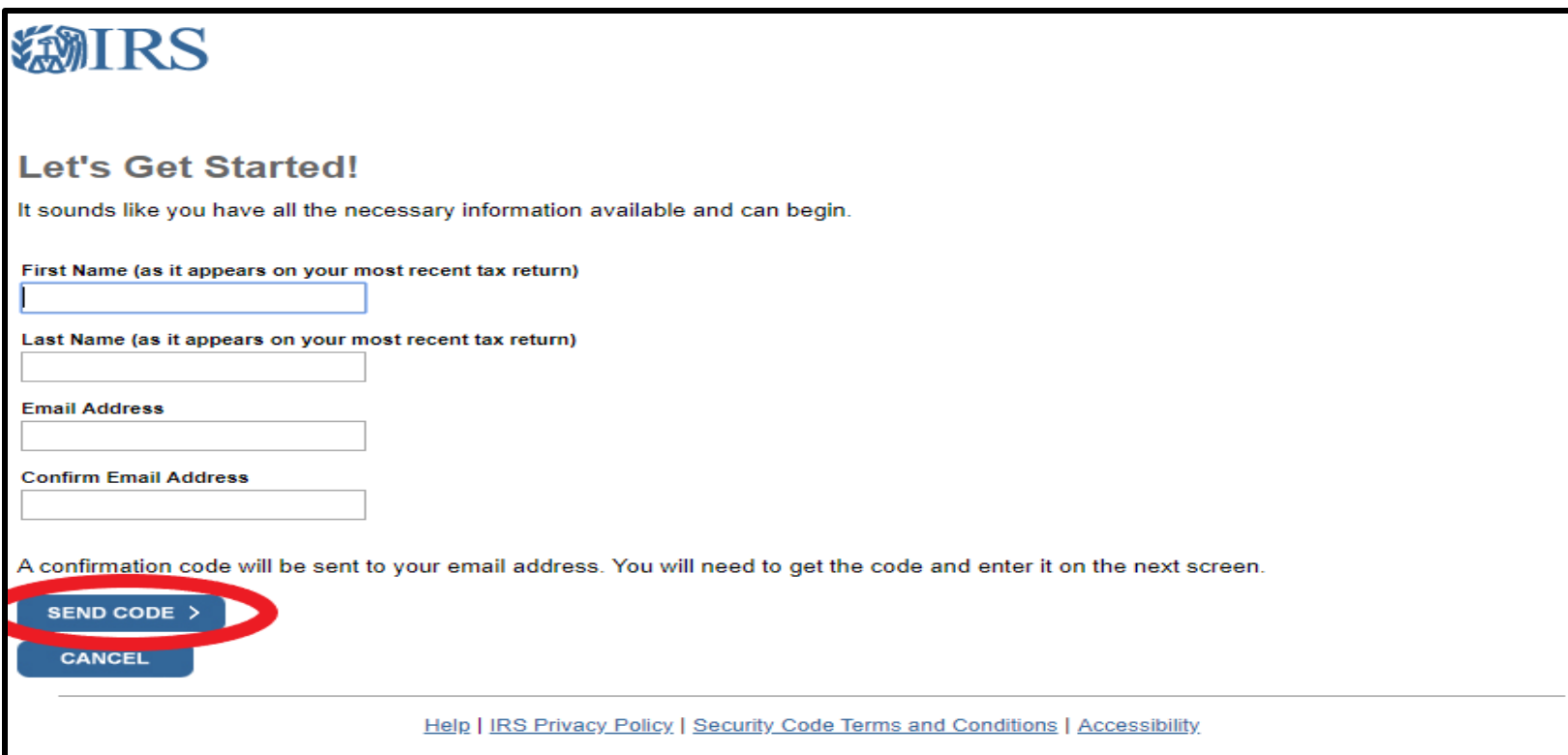
You can also complete identity verification by receiving a letter in the mail. If you choose this method, you'll either need a U.S.-based phone number or an iPhone, iPad, or Android device to complete registration.


CONTINUE >

[Exit Registration](#)

[Help](#) | [IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

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.

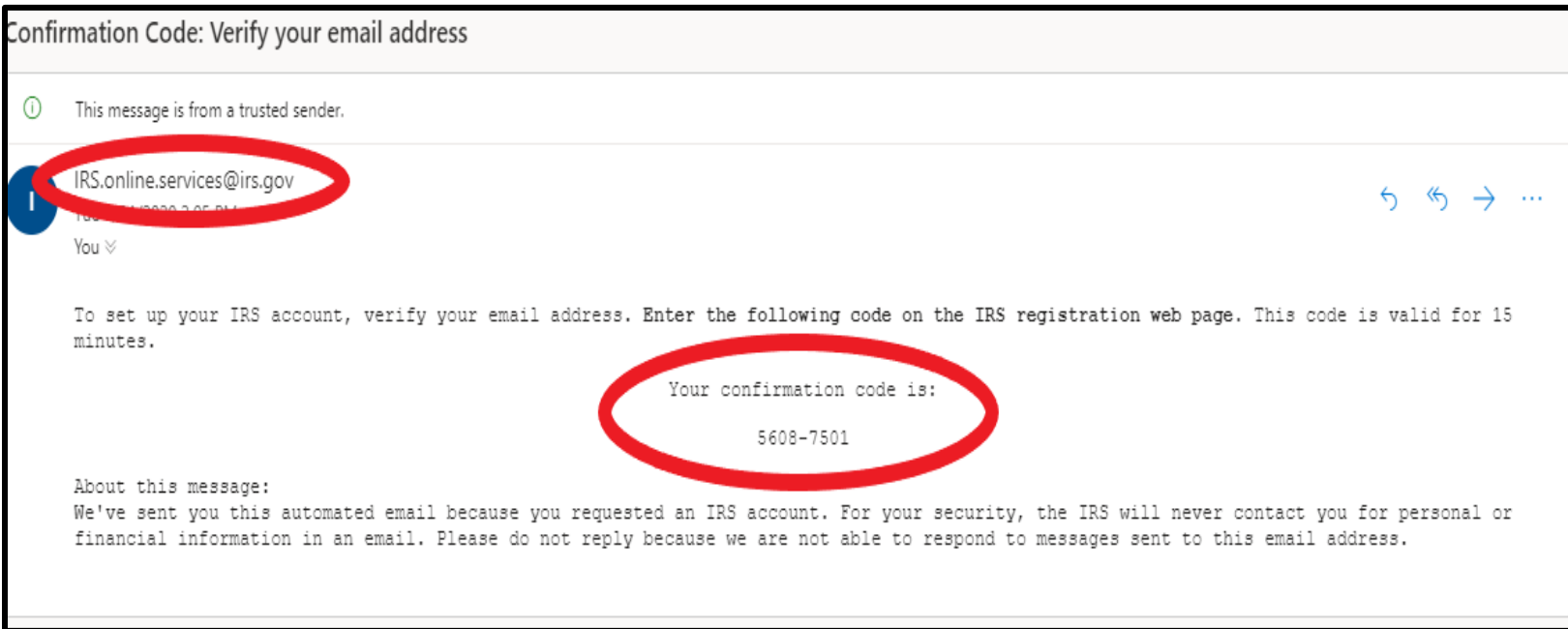
SEND CODE >

CANCEL

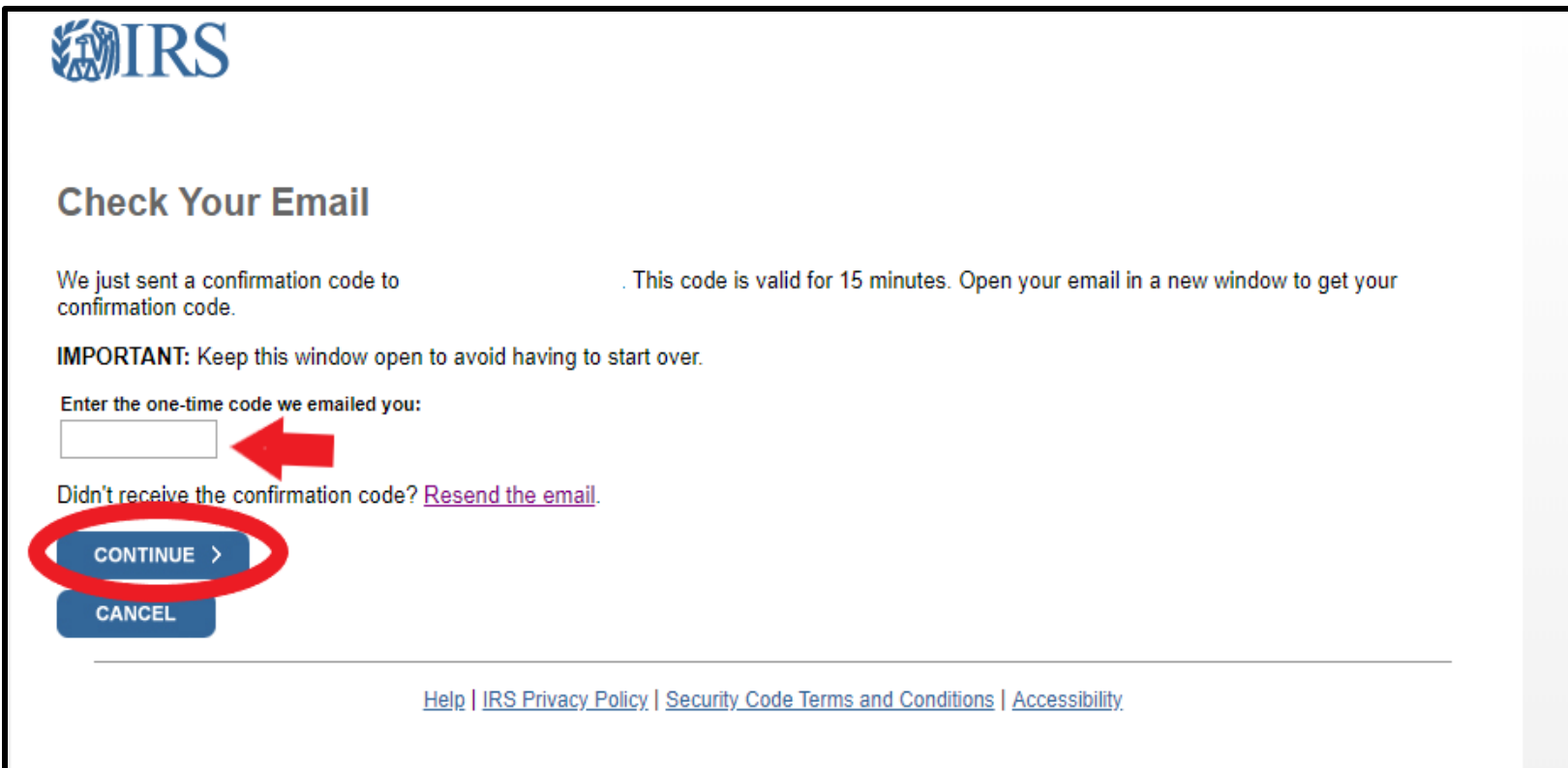
[Help](#) | [IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

Requesting a Tax Return Transcript Online

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.



10. Enter the code from the email on the IRS website and the click “CONTINUE.”



Requesting a Tax Return Transcript Online

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.”

Help us verify your identity with some basic information

If we are not able to match the information you enter with our records, you will not be able to use this online service but [other options are available to you.](#)

Personal Information

All information should match your latest tax return.

First Name

[Edit](#)

Last Name

[Edit](#)

Date of Birth

Month Day Year

Social Security Number (SSN) or [Individual Tax ID Number \(ITIN\)](#)

- -

Filing Status

I have filed a tax return in the past seven years

Select filing status from your most recently filed tax return

I have not filed a tax return in the past seven years

Address Information

Your address must match your most recently filed tax return. [Address Help](#)

Address Line 1

Address Line 2 (Optional)

City

State / Territory

Zip Code

Country

United States


CONTINUE >

CANCEL

[Help](#) | [IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

Requesting a Tax Return Transcript Online

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

(We are unable to verify debit cards, corporate cards, or American Express cards)
- Student loan account number
- Auto loan account number
- Mortgage or home equity loan account number
- Home equity line of credit account number
- I 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.

CONTINUE >

Financial account information

We will only use this information to verify your identity. You will not be charged any money and are not sharing any account balances 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.

If you have a credit freeze, you authorize us to bypass that freeze to verify your identity.

If you do not wish to or cannot provide the information, you will not be able to register but other [options are available to you.](#)

[Help](#) | [IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

Requesting a Tax Return Transcript Online

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.

IRS

Verify your phone number

To protect your information, we need to send a text message to your mobile phone number.

Your name must be associated with your US-based mobile phone account. We can't verify landlines or virtual phone numbers like Google Voice.

Enter your mobile phone number:

CANCEL **SEND MESSAGE >**

A text message will be sent to your phone. Message and data rates may apply. By continuing, you opt-in to receive a one-time code via text message each time you log in. [We won't use your phone number for any other communication.](#)

Don't have a mobile phone or can't verify your phone number? Try these alternative options.

[Receive an activation code by postal mail \(5-10 calendar days\).](#) Selecting this option will allow you to create your username and password, but you won't be able to access the online service today. You'll need to come back to activate your account after you receive the activation code in the mail.

[Review options that don't require a mobile phone or an activation code by postal mail.](#) These other alternatives will not allow you to complete registration for this online service.

[IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

14. Once you receive the text on your phone enter the code and then click “CONTINUE.”

IRS

We sent an activation code text message to your phone

The message contains a 6-digit activation code. Please enter the code below.

6-digit activation code [Try again](#)

CANCEL **CONTINUE >**

[IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)

Requesting a Tax Return Transcript Online

15. Create a Username and Password. Confirm or edit your email address. Choose a Site Phrase.

We've been able to confirm your identity. Now you will create a user profile. This is the last step in the process.

Create a Username and Password

Username

Password

Re-enter Password

Email [Edit](#)

Choose a Site Phrase

Create a phrase that you will recognize when you login

Enter a username of your choice. The username should be 8-64 characters and cannot be an email address, SSN, or contain a space, or a special character (!@#\$\$%^&*).


Password Rules:

- Between 8 and 32 characters long.
- Must contain at least one numeric and one special character (!@#\$\$%^&*).
- At least one uppercase and at least one lowercase letter.
- Matching password must be re-entered.

16. Choose a Site Image you will recognize when you log in, then click "CONTINUE."

Choose a Site Image

Select an image that you will recognize when you login

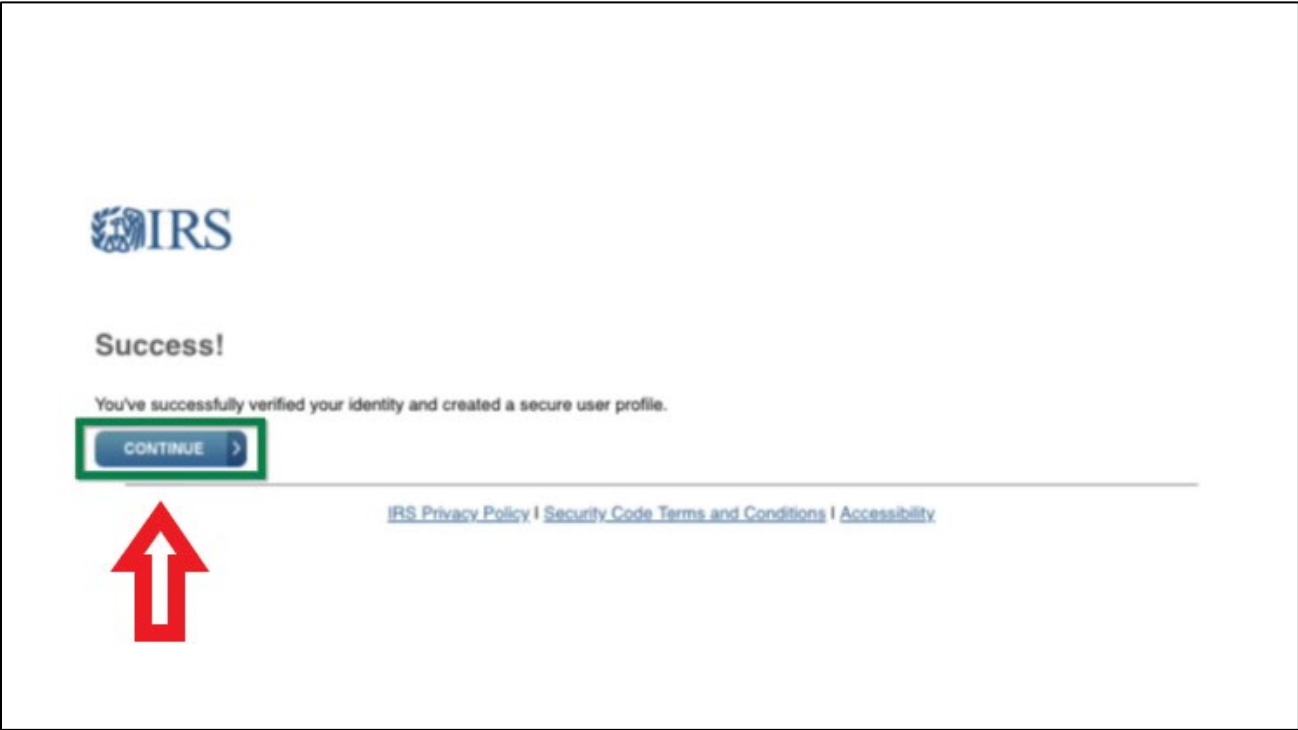


[Choose Your Site Image](#)

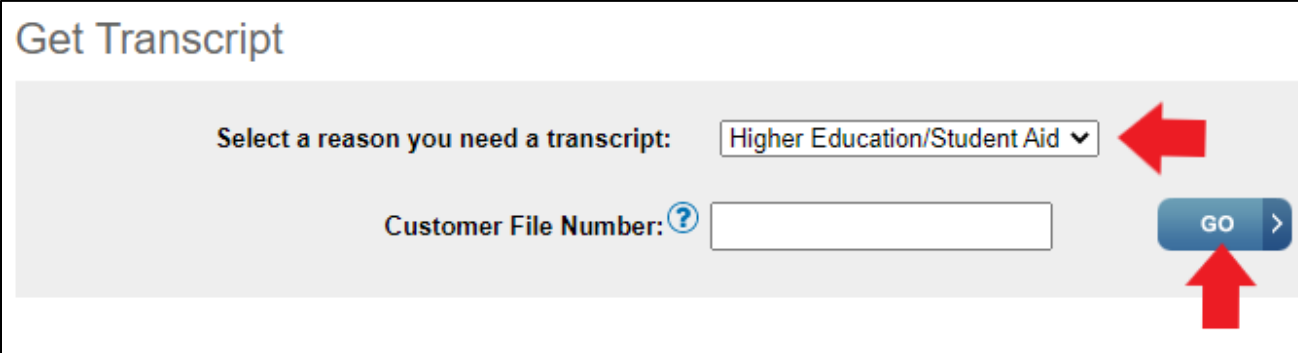
CANCEL **CONTINUE** >

Requesting a Tax Return Transcript Online

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.)



Requesting a Tax Return Transcript Online

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.”

Get Transcript

Select a reason you need a transcript: Higher Education/Student Aid ▾

Customer File Number:

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

Below are the transcripts and years available.

Return Transcript	Record of Account Transcript
2019	2019
2018	2018
2017	2017
2016	2016

Account Transcript	Wage & Income Transcript
2019	2019
2018	2018
2017	2017
2016	2016

Show All +

Show All +


Glossary

Return Transcript
Tax Return Transcripts show most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. This transcript does not reflect any changes you, your representative or the IRS made after you filed your return. In many cases, a Return Transcript will meet the requirements of lending institutions offering mortgages and student loans.

Record of Account Transcript
Record of Account Transcripts combine the information from tax account and tax return transcripts.

Requesting a Tax Return Transcript Online

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

This Product Contains Sensitive Taxpayer Data

Request Date: 06-02-2018
Response Date: 06-02-2018
Tracking Number: XXXXXXXXXXXXX
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.

SSN: XXX-XX-AAAA

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