

How to Request a Tax Return Transcript

A "tax return transcript" is a print-out from the IRS that contains most of the information on your tax return. Although the name is similar, it is NOT the same as the tax return that you file. A tax return transcript is provided free of charge by the IRS and can be requested online, by phone, or by mail. If you are not eligible to complete the data retrieval process in the FAFSA, or if you have tried the data retrieval process and have continued to have trouble with it, you will need to request a tax return transcript.

VERY IMPORTANT: When requesting a tax return transcript, have it sent to your address. Once you have received it, make a copy for yourself, write the student's name and CSU ID number on the original transcript (parent(s) write the student's name on your copy), and send it to the Financial Aid Office. Otherwise, we may not be able to match the transcript to the student

Online Request-Visit <http://www.irs.gov/Individuals/Order-a-Transcript>.

1. Before visiting the website have your Social Security Number handy. You will also need the address used on your tax return.
2. Click on the "Order a Transcript" link listed in step 3.
3. Be sure to select "Return Transcript" under the "Type of Transcript" field. Make sure that you request the 2018 tax information sent for the 2020-2021 FAFSA. There are other transcript types, so be sure to select "Return Transcript."
4. Be sure to enter the address exactly as it is on file with the IRS-this will generally be the address listed on the latest tax return filed. If you used "Street" on your tax return, do not use "St." on the transcript request.
5. If filed successfully, you can expect to receive a paper IRS Tax Return Transcript at the address you provided within 5-10 days.

Telephone Request-Call IRS at 1-800-908-9946 (from the U.S.) or 267-941-1000 (from overseas).

1. Have your social security number and street address available. Be sure that the address you provide is the address currently on file with the IRS-this will generally be the address listed on the latest tax return filed.
2. Select Option 2 to request an IRS TAX Return Transcript. Enter 2018 for the 2020-2021 FAFSA.

3. If filed successfully, you can expect to receive a paper IRS Tax Return Transcript at the address you provided within 5-10 days.

Paper Request-Download the IRS Form 4506T-EZ or IRS Form 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>

1. Fill out the required information. Be sure that the address you provide is the address currently on file with the IRS-this will generally be the address listed on the latest tax return filed.
2. **Note:** Have the transcript sent to yourself, and then you send the transcript to the Financial Aid Office.
3. Make sure that you request the 2018 Tax Return Transcript for the 2020-2021 FAFSA.
4. Mail the form to the address provided on page 2 of the form.
5. If filed successfully, you can expect to receive a paper IRS Tax Return Transcript at the address you provided within 5-10 days of the IRS receiving and processing your signed request.

