



How to obtain a TAX RETURN TRANSCRIPT

Make sure to order the Tax RETURN Transcript.

We cannot accept a "tax account transcript" in place of the tax RETURN transcript.

1. **FAFSA-IRS DATA RETRIEVAL*** is the easiest way to go. Log onto the FAFSA site, www.fafsa.ed.gov using your PIN and select the FAFSA-IRS DATA RETRIEVAL process. This will allow the IRS to automatically send your Tax Return Transcript to FAFSA, which means RRCC will not need a paper copy of it.
2. **ONLINE at www.irs.gov :**
 - Under Tools, click on "[Get Transcript of Your Tax Records](#)".
 - While on the "Get Transcript" screen, select to "[Get Transcript ONLINE](#)" for immediate printing Or "[Get Transcript by MAIL](#)".
 - "Sign In" using your User ID or "Sign Up" if you have not yet created one.
 - Once you are Signed in: (Selecting various buttons will offer various suggestions for types of documents to download) Select the "Higher Education/Student Aid" button and the page will now suggest "Return Transcript" (Type of requested document is now inside of selection frame)
 - Select the year of the requested document, ie: 2013.
 - You should now be viewing your "Tax Return Transcript" on screen.
 - Print the .pdf file
3. **By PHONE**
 - Dial 1-800-908-9946.
 - Follow the prompts, and have your tax return in order to answer the prompts.
(Select option 2 or 4 for transcripts)
4. **By MAIL**
 - Download and print the 4506-T form found at www.irs.gov.
 - Fill it out with the correct Aid Year.
 - Mail the form to the IRS. (The address you'll need is on the 4506-T form.)

Helpful Tips:

--There is no fee for a TAX RETURN TRANSCRIPT. If you are ordering online and it is asking for payment, exit the site immediately. Make sure you are on the www.irs.gov site only.

--Sometimes your address is automatically updated or adjusted by the United States Postal Service. When that happens, the information is relayed to the IRS. It is possible, therefore, that USPS made an address change that will affect whether you can request your return transcript online. For individuals who have issues with the address on their return, visiting the IRS in person or speaking to an IRS Customer Service Rep (CSR) by phone are the only two options.

--Speaking to an IRS Customer Service Rep by phone can exceed a one-hour wait time. (Remember to charge your cell phone.). You must listen for the prompts and go through the whole menu. **Do not** press the button when it asks if you want a tax transcript. **You will need your federal 1040 tax return in hand.** The IRS will require information in addition to your name, address, SSN and DOB; they're going to also ask questions about the data on the tax form, such as your adjusted gross income (AGI) or the exact amount in taxes paid, to verify your identity. If you do not have the tax return, you will not be able to order the tax return transcript.

--If you prefer to have the transcript faxed, the Customer Service Rep will fax the form immediately, *with the taxpayer on the line; however, the taxpayer must be at the fax machine. The CSR is going to verify with the taxpayer that they are receiving the fax as it is being sent.* There is no wait time for the fax. However, they will not fax it if the taxpayer is not at a fax machine at the time of request.

*Reasons an IRS data retrieval is not possible include taxes have not been paid, ID theft, married/filing separately.