

## IRS Tax Return Transcript Request Process

The quickest and easiest way to provide William Peace University with your IRS Tax Information is by using the DATA Retrieval Tool (DRT) on your Free Application for Federal Student Aid (FAFSA). Log into your FAFSA at [www.FAFSA.ed.gov](http://www.FAFSA.ed.gov) with your assigned PIN#, DO NOT MAKE ANY CHANGES to original data, just opt to use the DRT. A successful DRT submission eliminates the need to contact the IRS for a tax transcript.

\*\*If the DRT is not successful or if you are unable to use the DRT option there are several ways you can request your 2017 TAX TRANSCRIPT from the IRS.

### I. Online Request

#### a. Available at [www.irs.gov](http://www.irs.gov)

- i. On homepage Tools section click, “Get A Tax Transcript” (IF amended return completed, and Account Transcript is requested.)
  - Select Get Transcript ONLINE
  - You will need to create a First Time User account if this is the first time using this system.
  - Provide the tax filer’s SSN, DOB, Street Address (as it appears on your tax return), and zip or postal code-Select continue
  - In TYPE of Transcript filed, select “TAX RETURN TRANSCRIPT” and in Tax Year field, select 2017
  - If validated, tax filers can print their transcript immediately.

### II. Mail Request

#### b. Available at [www.irs.gov](http://www.irs.gov)

- ii. On homepage Tools section click, “Get Transcript of Your Tax Records” (IF amended return completed, and Account Transcript is requested.)
  - Select Get Transcript by MAIL
  - If you filed jointly with your spouse, tax account data is listed under the SSN of the primary taxpayer. The primary taxpayer is the person listed first on the tax return
  - Provide the tax filer’s SSN, DOB, Street Address (as it appears on your tax return), and zip or postal code-Select continue
  - In TYPE of Transcript filed, select “Return Transcript” and in Tax Year field, select 2017
  - If validated, tax filers can expect a paper return transcript at the address included in their online request within 5-10 days. IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS

### III. Telephone Request

#### a. Dial 1-800-908-9946

- i. Tax filers must follow prompts in entering their SSN and street address (as it appears on your tax return)
  - Select “option 2” to request an IRS Tax Return Transcript
  - Enter “2017”
  - If validated, tax filers can expect to receive a paper IRS Return Transcript at the address used in their telephone request. IRS Tax Return Transcripts requested by telephone cannot be sent direct to a third party by the IRS.