

2018-2019 How to Guide: IRS Tax Return Transcript

How to obtain a Tax Return Transcript from the IRS online or through mail if I am not eligible to use the Data Retrieval Tool.

- Due to changes made in 2012 by the Department of Education, the MTC Student financial Services Office is **unable to use personal copies of your Tax Return** for Verification for the **2018-2019** academic year.

Step 1: Student/Parent go to www.IRS.gov and click “Get My Tax Record”

The screenshot shows the IRS website homepage. At the top left is the IRS logo. To the right of the logo are links for 'Help', 'News', and 'Language'. Further right are buttons for 'Charities & Nonprofits' and 'Tax Pros'. Below these are navigation tabs for 'File', 'Pay', 'Refunds', 'Credits & Deductions', and 'Forms & Instructions'. The main content area features a grid of service tiles. The tile for 'Get Your Tax Record' is highlighted with a red border. Other tiles include 'Refund Status', 'View Your Account', 'e-Services for Tax Professionals', 'Where's My Amended Return?', 'Make a Payment', 'Employer ID Number (EIN)', and 'Visit the Trucking Tax Center'.

Step 2: To receive your Tax Return Transcript **ONLINE**, click

Get Transcript Online

To receive your Tax Return Transcript through **MAIL**, click

Get Transcript by Mail

Get Transcript Online

Get Transcript by Mail

What You Need

To register and use this service, you need:

- your [SSN](#), date of birth, filing status and mailing address from latest tax return,
- access to your email account,
- your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- a mobile phone with your name on the account.

What You Get

- All [transcript types](#) are available online
- View, print or download your transcript
- Username and password to return later

What You Need

To use this service, you need your:

- [SSN](#) or [Individual Tax Identification Number \(ITIN\)](#),
- date of birth, and
- mailing address from your latest tax return

What You Get

- Return or Account [transcript types](#) delivered by mail
- Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you

Step 3: If you do not have an account, click [CREATE ACCOUNT >](#). If you have an account, enter your username and click [LOG IN >](#). If you have an account, but do not know your username, click [Forgot Username](#).



Sign Up

Don't have an account? Create one now.

[CREATE ACCOUNT >](#)

Log In

Already have a username? Welcome back!

Username

[LOG IN >](#)

[Forgot Username](#)

PTIN and FIRE users need a separate account in this system

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.

IMPORTANT: You will need **all** of the following information and materials to complete your registration with the IRS.

- Full Name
- Email
- Birthday
- Social Security Number (SSN) or Identification Number (ITIN)
- Tax filing status
- Current Address

You will need one of the below financial accounts to verify your identity. You will not be charged any money and are not sharing any account balances or other financial information with the IRS.

- Credit Card **OR**
- Mortgage or Home Equity Loan **OR**
- Home Equity Line of Credit **OR**
- Auto Loan

You will need to have your US-base mobile phone with your name associated to the mobile phone account with you to verify your phone number today. This service will not work on Pay-As-You-Go (Prepaid) plans, landlines, Skype, Google Voice, or similar virtual phones.



You may also call to request an IRS Tax Return Transcript by dialing:
1-800-908-9946.

Please submit your requested IRS Tax Return Transcript to the MTC Student Financial Services Office as soon as possible to expedite processing.

IMPORTANT: If you are married and filed a **joint tax return** with your spouse, tax account data is listed under the social security number of the primary taxpayer (the name and social security number listed first on the tax return) shown on your tax return.

If you have filed an **extension** and have not filed your 2016 taxes, we need your Form 4868, Request for an Extension and your 2016 W2s (if self-employed, you must provide a signed statement estimating your Adjusted Gross Income (AGI) and income taxes paid for 2016). We can process your Verification using the estimated numbers **BUT** once your taxes have been filed, you will need to submit copies of your IRS Tax Return Transcript to the Student Financial Services Office. Your financial aid awards may change to reflect the actual numbers on the transcript.

If you have filed an **Amended Tax Return**, you are required to submit your signed 1040X form. You cannot use the online Data Retrieval Tool.