



# Saint Martin's UNIVERSITY

Office of Student Financial Services

## Requesting an IRS Tax Transcript

### Online Request for your Tax Transcript

Transcripts are available online via the IRS website. You will need to register and be able to provide personal information, contact information, and a personal number from a credit card, mortgage, home equity loan/line of credit, or car loan. Visit the IRS website: <https://www.irs.gov/individuals/get-transcript> and select the "Get Transcript Online" option.

### Ordering Tax Transcript by Mail

- Visit the IRS website: <https://www.irs.gov/individuals/get-transcript>
- Click "Get Transcript by Mail"
- Enter the tax filer's Social Security Number, date of birth, street address, and zip code. Use the address currently on file with the IRS.
- Click Continue.
- Select "Tax Return Transcript" (NOT ACCOUNT TRANSCRIPT!) and in the Tax Year field, select your most recent filing.
- For 20/21 FAFSA choose a 2018 Tax Transcript
- If you are successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request within 5 to 10 business days.

### Problems Entering Your Street Address?

When entering the information into the IRS address matching system, note the following:

- The address entered must match the address already on file with the IRS exactly.
- The address on file is typically the address on your most recent tax return.
- Spelling out the word "Street" rather than using the abbreviation "St." can be enough to cause an error.
- Addresses on the IRS system are auto-corrected through a US Post Office program and may not match what you put on your tax return.

### We suggest the following if you run into problems:

- Have your taxes in front of you and enter the address carefully as it is on your return.
- If you entered your address as it appears on your return and it doesn't work, try using the standardized version of your address via the US Postal Service website.

### Telephone Request for your Tax Transcript Available from the IRS by Calling 1-800-908-9946

Tax filers must follow prompts to enter their social security number and the numbers in their street address. (Generally this will be numbers of the street address that was listed on the latest tax return filed.) Select "Option 2" to request an IRS Tax Return Transcript (not "Tax Account Transcript") and then enter the year of your most recent tax filing. For 20/21 FAFSA you should request a 2018 Tax Transcript.

### Schedule an Appointment with your Local IRS Office

The IRS will schedule you an appointment with your local office to request a tax transcript in person. Please note most IRS offices will not see you unless you have a scheduled appointment.

#### Student Financial Services

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