

## IRS Tax Return Transcript Request Process

### FAFSA - IRS Data Retrieval Tool

1. Go to FAFSA.gov
2. Click **“Start Here”** if it’s your first time applying  
**OR “Login”** if you have started a FAFSA already
3. Login student’s personal information
4. At **“My FAFSA”** select the FAFSA **year** you are applying for (current or other)
5. Select the blue link **“Make FAFSA Corrections”**
6. At **“Intro. Page”** select NEXT  
Enter your PIN and create a new password
7. Click on the **“Financial Information”** tab at the top.
8. From there, follow the instructions in the green box to determine if the parent and/or student is eligible to use the IRS Data Retrieval Tool to transfer the IRS income tax information into the student’s FAFSA.

***Note: Make sure you sign and submit the update on the FAFSA application***

## IRS Tax Return Transcript Request Process

### Telephone Request

- 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. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select **“Option 2”** to request an IRS Tax Return Transcript and then enter the **year** you are requesting (current or other).
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.

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### Online Request

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov)
- In the **Tools** section of the homepage click **“Order a Return or Account Transcript”**
- Under step #3 Click **“Order a Transcript”**
- Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click **“Continue”**
- In the Type of Transcript field, **select “Return Transcript”** and in the Tax Year field, select the year (current or other).
- If 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 days from the time the on-line request was successfully transmitted to the IRS.

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### In Person Request

IRS Office  
1332 Anacapa St  
Santa Barbara CA 93101

(805) 564-7555 information message

### Hours of Operation:

Monday-Friday - 8:30 a.m. - 4:30 p.m.  
(Closed for lunch 12:30 p.m. - 1:30 p.m. & Federal Holidays)