



Tax Return Transcript/IRS Data Retrieval Tool Information

Please Note: If you can use the **IRS Data Retrieval Tool (DRT)** but choose not to at the time you completed your FAFSA, you can log back into your FAFSA and use the DRT rather than submit a Tax Return Transcript.

Can I use the IRS DRT?

You **cannot** use the Data Retrieval Tool if you filed:

- Married, filing separately
- Married, head of household
- An amended tax return
- A foreign tax return

Or if you:

- Use an Individual Taxpayer Identification Number (ITIN) rather than a Social Security Number to file your tax forms with the IRS
- Have a change in marital status after December 31st.

How do I obtain a Tax Return Transcript?

- Get Transcript ONLINE or request by MAIL; [IRS.Gov/Individuals/Get-Transcript](https://www.irs.gov/individuals/get-transcript).
- Call IRS 1-844-545-5640 to speak to a live person or schedule an appt. for a transcript request.
 - IRS Yakima office address: 107 S 7th Ave #200, Yakima, WA 98902

Tax Return Transcript Timeline

The timing of when you can successfully request a copy of your Tax Return Transcripts depends on if you owe taxes at the time of filing, and if you filed electronically or by paper. See below for details.

	<i>Electronic Filing</i>	<i>Paper Filing</i>
Filer who either did not owe an amount, or is expecting a refund	2-3 weeks after submission in most cases	8-11 weeks later in most cases
Filer who owed an amount, and made a full payment while filing	2-3 weeks after submission in most cases	IRS will start processing the tax return in June, Tax Return Transcript requests can be made successfully 2-3 weeks later in most cases
Filer who owed an amount, and made a full payment after filing	3-4 weeks after the payment is processed by the IRS in most cases	IRS will start processing the tax return in June, Tax Return Transcript requests can be made successfully 2-3 weeks later in most cases
Filer who owed an amount, and have not yet paid in full	IRS will start processing the tax return in May, Tax Return Transcript requests can be made successfully 2-3 weeks later in most cases	IRS will start processing the tax return in June, Tax Return Transcript requests can be made successfully 2-3 weeks later in most cases

Frequently Asked Questions:

CAN I JUST SEND A COPY OF MY TAX RETURNS?

No, the U.S. Department of Education no longer accepts a tax return for verification purposes. The student and/or parent must submit a Tax Return Transcript or if possible, use the IRS DRT within the FAFSA (see reverse side for IRS DRT information). The only exception is if you filed amended tax returns (see below for Amended Tax Return information).

I FILED AMENDED TAX RETURNS, WHAT DO I DO?

If you filed an amended tax return, you will need to submit a Tax Return Transcript for the original tax filing, AND a signed copy of your IRS Form 1040X. IRS Form 1040X is the Amended U.S. Individual Income Tax Return. It is designed for taxpayers who need to correct mistakes made on Tax Form 1040, Tax Form 1040A, Tax Form 1040EZ, Tax Form 1040NR, or Tax Form 1040NR-EZ.

WHO CAN ORDER THE TAX RETURN TRANSCRIPTS?

Only the first person that was listed on the federal tax return can order a transcript.

HOW MUCH DOES IT COST?

It is free to order a tax return transcript.

I'M HAVING ISSUES WITH MY ADDRESS or SECURITY QUESTIONS WHILE ORDERING ONLINE, WHAT NOW?

The address matching/security system used by the IRS to log in to their site is very picky and it must match the information on the filed tax form exactly. The address is usually what was on your last or most recent tax form. We suggest that you have your taxes in front of you to copy that address carefully. For example, spelling out the word "street" rather than using the abbreviation "st." can be enough to cause an error in their system. Enter the information to match exactly the way it shows on your tax form. If you are experiencing difficulties with the address or security questions while ordering online, you can contact the IRS Help Desk or choose another method of obtaining your Tax Return Transcript.

IRS Help Desk: 1-800-876-1715, Monday - Friday 5:00 a.m. - 5:00 p.m. (Pacific Standard Time).

Note: Please be aware that the IRS does not send emails to obtain, upload, or otherwise access your transcripts. If you receive such an email, please contact the IRS fraud group at phishing@irs.gov.