

HOW TO GET IRS DOCUMENTS

(For your reference only. Do not submit to the Office of Financial Aid Services.)

How to get an **IRS Tax Return Transcript**, free of charge:

- 1) **ONLINE** - Go to www.irs.gov. Click "Get Your Tax Record" then choose "Get Transcript Online" and follow instructions. Make sure to request the "IRS Tax Return Transcript" and *not* the "IRS Tax Account Transcript."
- 2) **By MAIL** - Go to www.irs.gov. Click "Get Your Tax Record" then choose "Get Transcript by Mail" and follow instructions. Make sure to request the "IRS Tax Return Transcript" and *not* the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- 3) **Automated Telephone Request – 1-800-908-9946**. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

*How to get an **IRS Wage and Income Transcript**. (for non-filers who need to submit copies of W2s and cannot locate them)

You may submit an IRS Wage and Income Transcript in lieu of W2s. If you need to obtain an IRS Wage and Income Transcript(s), follow the same procedure as above.

A Copy of your **IRS 1040 form** may also be submitted if you choose not to get a Tax Return Transcript.

If you choose to go this route please ensure the following:

1. Exclude all State tax forms.
2. Include both pages of the 1040 form and all applicable schedules that you filed (ex: schedules 1,2,3 or A through H)
3. You must physically sign page 2 of the 1040 form as shown in the signature example image example below.

VICTIMS OF ID THEFT:

If you are a victim of IRS tax-related identity theft and cannot obtain a tax return transcript, you may have to contact the IRS Identity Protection Specialized Unit (IPSU) at 800-908-4490 to obtain an alternate tax transcript called Tax Return Database View (TRDBV). Submit this alternate transcripts and a signed and dated statement that you are a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

This image below shows the signature field located at the bottom of page two of a 1040 form. The tax filer must sign as shown below should he or she choose to submit copies of 1040 tax forms instead of transcripts.



Third Party Designee	Do you want to allow another person to discuss this return with the IRS? See instructions <input type="checkbox"/> Yes. Complete below. <input type="checkbox"/> No		
Designee's name	Phone no.	Personal identification number (PIN)	
Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
Joint return? See instructions. Keep a copy for your records.	Your signature <i>John Smith</i>	Date 4/1/2024	Your occupation
	Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation
	Phone no.	Email address	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Paid Preparer Use Only	Preparer's name	Preparer's signature	Date
	Firm's name	PTIN	Check if: <input type="checkbox"/> Self-employed
	Firm's address	Phone no.	Firm's EIN

Go to www.irs.gov/Form1040 for instructions and the latest information.

Form **1040** (2022)

