

REQUESTING AN IRS TAX RETURN TRANSCRIPT



NOTE: HESAA DOES NOT CONSIDER PERSONAL COPIES OF YOUR FEDERAL TAX RETURN ACCEPTABLE DOCUMENTATION.

- Visit www.irs.gov
- Select "Get Your Tax Record"

The screenshot shows the IRS website interface. At the top is the IRS logo and navigation links: Help, News, Language, Charities & Nonprofits, and Tax Pros. Below these are tabs for File, Pay, Refunds, Credits & Deductions, and Forms & Instructions. The main content area features several service tiles. The tile for 'Get Your Tax Record' is circled in red, and a large red arrow points to it from the right. Other visible tiles include 'Pay Your Tax Bill', 'Get Your Refund Status', 'Preparer Tax ID Number (PTIN)', 'Individual Taxpayer ID Number (ITIN)', 'Apply for an Employer ID Number (EIN)', 'Get Answers to Tax Questions', and 'Apply for a Payment Plan'.

- You can then select "Get Transcript Online" or "Get Transcript by Mail"

Get Transcript Online

Get Transcript by Mail

To request an IRS Tax Return Transcript by phone call the IRS at 1-800-908-9946

IMPORTANT TIPS

- Remember to keep a copy of your tax RETURN TRANSCRIPT for your records before you submit it.
- If requesting by mail, it will be printed on both sides, make sure to copy both sides.
- If requesting by mail, allow 5-10 days to receive the transcript at the address the IRS has on file for you.
- When submitting tax RETURN TRANSCRIPT(S), be sure to include the student's name and NJ HESAA ID Number or Social Security Number.
- When requesting the IRS Federal Tax Return Transcript, please remember that it is the **TAX RETURN TRANSCRIPT** and NOT the **ACCOUNT TRANSCRIPT**. See images below:

This is a sample of an IRS Tax Return Transcript. It features the Internal Revenue Service logo and the text 'United States Department of the Treasury'. Below this, it states 'This Product Contains Sensitive Taxpayer Data'. The transcript is labeled 'Tax Return Transcript' with a green arrow pointing to it and the word 'YES' in green. At the bottom, it includes the following information: Request Date: MM-DD-YYYY, Response Date: MM-DD-YYYY, and Tracking Number: 400000000000.

This is a sample of an IRS Account Transcript. It features the Internal Revenue Service logo and the text 'United States Department of the Treasury'. Below this, it states 'This Product Contains Sensitive Taxpayer Data'. The transcript is labeled 'Account Transcript' with a red arrow pointing to it and the word 'NO' in red. At the bottom, it includes the following information: Request Date: mm-dd-yyyy, Response Date: mm-dd-yyyy, and Tracking Number: 1000 9876543.