IRS Tax Transcript Request Guide

Your 2014 Income Tax Transcript should be available through the IRS's Get Transcript tool if you have already filed your 2014 federal income tax return and you have waited an appropriate amount of time for the IRS to process your return. Estimated timelines are detailed in the table below.

<table>
<thead>
<tr>
<th>Tax Return Results</th>
<th>Transcript Available (after e-filing)</th>
<th>Transcript Available (after paper filing)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No additional taxes owed</td>
<td>2-3 weeks</td>
<td>8-11 weeks</td>
</tr>
<tr>
<td>Taxes owed; full payment submitted with tax return</td>
<td>2-3 weeks</td>
<td>Return not processed until June; 2-3 weeks after processing</td>
</tr>
<tr>
<td>Taxes owed; full payment submitted after filing taxes</td>
<td>3-4 weeks after payment is made</td>
<td>Return not processed until June; 2-3 weeks after processing</td>
</tr>
<tr>
<td>Taxes owed; full payment not submitted</td>
<td>Return not processed until May; 2-3 weeks after processing</td>
<td>Return not processed until June; 2-3 weeks after processing</td>
</tr>
</tbody>
</table>

You will not be able to request a tax transcript if you filed an amended return (form 1040-X) or are a victim of identity theft. If this is the case, you will need to submit alternative documentation.

**Note:** When verifying your identity, the Get Transcript tool may ask you questions about your credit history. It may be useful to have a copy of your credit report ready to ensure that you answer the questions correctly.

On the Get Transcript screen, select “Get Transcript Online”.

Get Transcript

You can get a transcript online or by mail to view your tax account transactions, line-by-line tax return information or wage and income reported to us for a specific tax year. The method you used to file your return and whether you have a refund or balance due affects your current year transcript availability. Note: If you need a photocopy of your return, you must use Form 4506.

- To use Get Transcript Online, you must have a Social Security number (SSN) and immediate access to your email account to confirm your email address. Then you'll need to answer personal, financial and tax related questions to verify your identity. If you previously registered, just log in with your user ID and password.
- To use Get Transcript by Mail, you need your SSN or an Individual Tax Identification Number (ITIN), date of birth, and address from your latest tax return.

* The IRS never sends email requesting you to obtain, upload or access your transcripts. If you receive such an email, please forward it to our fraud group at phishing@irs.gov.

If you created an online account already, you'll be able to sign in to get your transcript. If you don't already have an account, you'll need to select “Get Started” under the Create a Login header. If you don't want to create an account, you can opt to sign in as a guest later on in the process.

Create a Login

Create a Login to:
- Verify your identity for access to your personal tax information.
- Create a user ID and password to save time on future visits.
- Reactivate your user ID and password.

Information you need to verify your identity

Login

User ID

Mask User ID

Forgot User ID
4 Begin filling out your personal information. You will need to provide an e-mail address to retrieve an e-mail confirmation code in order to continue with your request. After you have filled out your name and e-mail address, select “Send Email Confirmation Code”.

Sign Up: Step 1 of 6

All fields are required.

First Name
Gary

Last Name
Blue

Email
gblue@caltech.edu

Confirm Email
gblue@caltech.edu

Click the “Send Email Confirmation Code” button. A confirmation code will be sent to your email address.

CANCEL SEND EMAIL CONFIRMATION CODE

5 Check your e-mail for a message from the IRS. The e-mail should contain an eight digit code. Copy or type the code into the box and select “Continue”.

Step 2 of 6: Confirmation Code

Do not close this browser window, or you will have to restart the process.
• A confirmation code will be sent to your email address within the next 10 minutes.
• Check your spam folder if you do not receive an email.
• Open your email in another browser window:
  Gmail Outlook Yahoo AOL

Enter Confirmation Code
1111-1111

CANCEL CONTINUE
Fill in the rest of your information, including your Social Security Number, date of birth and the address on file from your last tax return.

Social Security Number (SSN) or Individual Tax ID Number (ITIN)

Date of Birth

Filing Status

I have filed a tax return in the past seven years

I have not filed a tax return in the past seven years

Note: Make sure that your address matches your last tax return exactly, including any abbreviations. For example, 100 Sharp Street Apt 14 is not the same as 100 Sharp Street #14 or 100 Sharp St Apt 14.

Address

How to format your address

Your address must match your most recently filed tax return.

Country

United States

Address Line 1

2000 Bridge Pkwy #200

Address Line 2 (Optional)

City

Redwood City

State/U.S. Territory

California

Zip Code

94065
Note: If you don’t want to create an online account with the IRS, mark the radio button labeled “Proceed as guest.” This will allow you to continue without creating logon credentials. Otherwise, you can select “Create a User ID and Password” and create an account for future access. Once everything has been filled out, click “Continue”.

Contact Information (Optional)

Phone Number (Optional)

Mobile Number (Optional)

Login Options

- Create a User ID and Password.
  A User ID and Password will allow you to skip entering this information when you access the system.

- Proceed as guest.
  Proceeding as guest will require you to enter this information every time you access the system.

CANCEL CONTINUE

The IRS will ask you several questions in order to confirm your identity. You may be asked about personal information, such as previous addresses, or your credit history. Answering these questions incorrectly may cause you to be locked out of the Get Transcript Tool. Answer the questions and click “Continue” at the bottom of the page.

Sign Up: Step 4 of 6

All fields are required. This information is being validated by a third party.

Your credit file indicates you may have had an auto loan/lease, closed on or around [redacted] Who was the credit provider for this account?

[Redacted]
Now that you have completed the security questions, you will be able to access your transcript online. The Financial Aid Office requires your 2014 Return Transcript in order to process your application. The Return Transcript is highlighted in green below. If you select “Higher Education/Student Aid” as the reason you are requesting a transcript at the top of the screen, your browser will highlight the Return Transcript box, too. Select the 2014 transcript to open it in your web browser.

Select a reason you need a transcript: Higher Education/Student Aid

You selected: Higher Education/Student Aid
We suggest you download: Return Transcript

Below are the transcripts and years available.

<table>
<thead>
<tr>
<th>Return Transcript</th>
<th>Record of Account Transcript</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>2014</td>
</tr>
<tr>
<td>2013</td>
<td>2013</td>
</tr>
<tr>
<td>2012</td>
<td>2012</td>
</tr>
<tr>
<td>2011</td>
<td>2011</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account Transcript</th>
<th>Wage &amp; Income Transcript</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>2014</td>
</tr>
<tr>
<td>2013</td>
<td>2013</td>
</tr>
<tr>
<td>2012</td>
<td>2012</td>
</tr>
<tr>
<td>2011</td>
<td>2011</td>
</tr>
</tbody>
</table>

Glossary

Return Transcript
Tax Return Transcripts show most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. This transcript does not reflect any changes you, your representative or the IRS made after you filed your return. In many cases, a Return Transcript will meet the requirements of lending institutions offering mortgages and student loans.

Record of Account Transcript
Record of Account Transcripts combine the information from tax account and tax return transcripts.

Account Transcript
Tax Account Transcripts provide any adjustments either you or we made after you filed your return. This transcript shows basic data, including marital status, type of return filed, adjusted gross income and taxable income.

Wage & Income Transcript
Wage and Income Transcripts show data from information returns, such as W-2s, 1099s and 1098s, reported to the IRS. Most recent year information may not be complete until July.
If your transcript does not open on your screen, make sure that your pop-up blocker is not preventing a new window from opening.

You should now have your transcript. Make sure that it is for the 2014 tax year and says “Tax Return Transcript”. If you have the correct transcript, save a copy to your computer as a .pdf file and submit it to the Caltech Financial Aid Office. If you have not uploaded your documents to IDOC, include a copy of your tax return transcript with the rest of your IDOC files. If you have already submitted your documents to IDOC, send the transcript directly to the Financial Aid Office by fax at (626) 564-8136 or as an e-mail attachment to FinAidDoc@caltech.edu.