

# Obtaining IRS Tax Information

## Request Transcripts from the IRS

If you are unable to use the IRS Data Retrieval Tool, you will need to do **one** of the following to obtain a copy of your tax return (There is no fee or charge for requesting a copy of your tax return transcript):

- Call 1-800-908-9946 and request a copy via phone
- Visit the IRS Tax Center in Walnut Creek (185 Lennon Lane, Walnut Creek, CA, 94598, Mon-Fri, 8:30am-4:30pm, (925)974-3898, call (844)-545-5640 to schedule an appointment
- Request it online at [www.irs.gov](http://www.irs.gov) (follow instructions below)

The screenshot shows the top navigation bar of the IRS website with four buttons: "File Your Tax Return", "Get Your Refund Status", "Pay Your Tax Bill", and "IRS.gov En Español". Below this is a menu with four categories: "Forms and Pubs", "Hot Topics", "Tools", and "Filing & Payment". The "Tools" category is circled in red, and the "Get a tax transcript" link within it is also circled in red. The "Filing & Payment" category lists several services: "where's my refund?", "freefile", "e-file", and "EFTPS".

- From the main IRS webpage under TOOLS, click “Get a tax transcript”
- To print out your needed transcripts click “Get Transcripts ONLINE”
  - If this is the first time you are using this online service, follow the on screen direction for “First Time Users” to create a Username and Password. *To complete this you will need your Full Name, Email, Birthdate, SSN, Tax Filing Status, Current Address, a number from one of your financial accounts such as a credit card, and a cell phone with text message capability.*

### First Time Users

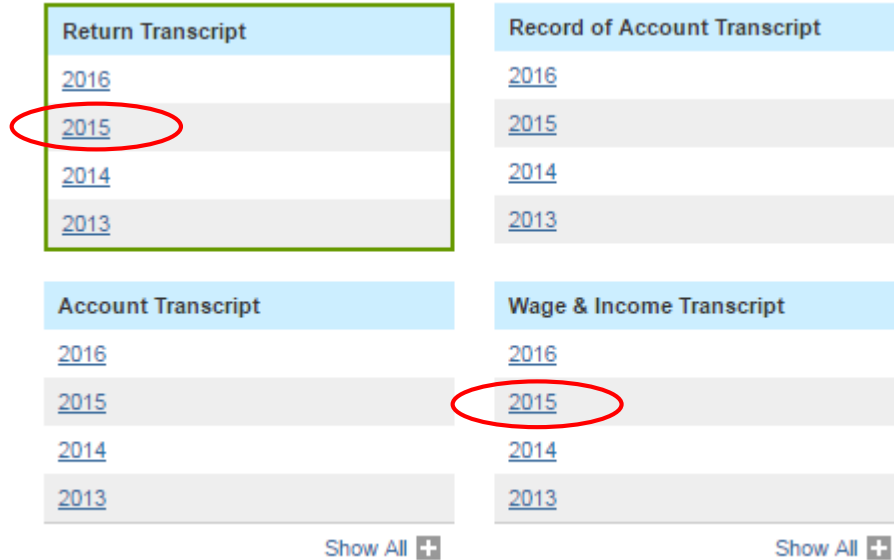
If this is the first time you are using this online service, we will need to verify your identity before we proceed.



- If you have previously created an account “Log In” with your Username.

The screenshot shows two options for getting a transcript: "Get Transcript ONLINE" and "Get Transcript by MAIL". Both buttons are circled in red. The word "OR" is placed between them. Below each button is a "What You Need" section. The "ONLINE" section lists requirements: SSN, date of birth, filing status, mailing address, email account, and a mobile phone. The "MAIL" section lists requirements: SSN or ITIN, date of birth, and mailing address. Below each "What You Need" section is a "What You Get" section. The "ONLINE" section lists: all transcript types available online, view/print/download transcript, and username/password to return later. The "MAIL" section lists: return or account transcript types delivered by mail, and transcripts arrive in 5 to 10 calendar days.

- Once you have either created an account or logged in follow the following steps
  - Select a reason you need a transcript as: “Higher Education/ Student Aid” and click “Go”
  - Now select the type of Transcript and Year that you need
    - ✓ Choose 2015 under Return Transcript to print out a copy of your **2015 Tax Return Transcript** required for verification purposes. This transcript can also be used as *Proof of Non- Filing*.
    - ✓ Choose 2015 under **Wage & Income Transcript** to provide W-2 information



- To get your transcripts mailed click “**Get Transcripts by MAIL**”
  - When warning message appears click “OK”
  - Fill out required fields

The screenshot shows the IRS 'Get Transcript by Mail' form. The following fields are circled in red:

- Social Security Number (SSN) or Individual Tax ID Number (ITIN)
- Date of Birth (Day and Month dropdowns)
- Street Address
- ZIP or Postal Code

Other visible elements include the IRS logo, 'Contact Us | Exit' link, 'En Español | Privacy Notice' link, 'All fields are required' note, and a 'Continue' button.

- Select Type of Transcript and Year
  - ✓ Choose “Return Transcript” and “2015” to be mailed a copy of your **2015 Tax Return Transcript** required for verification purposes. This transcript can also be used as *Proof of Non- Filing*.
  - ✓ You are unable to request a Wage & Income Transcript to be mailed