

Instructions for Obtaining an IRS Tax Return Transcript

OPTION 1: Request the IRS Mail you a copy of your Tax Return Transcript

Caution: *if your address has since changed, this method is not recommended as the transcript may be mailed to your old address.*

1. Go to <https://www.irs.gov/individuals/get-transcript>
2. Click on "**Get Transcript by mail**".
3. When you get to the U.S. Government warning click "OK"
4. You will need the taxpayer's social security number (SSN) or individual tax payer identification number (ITIN), date of birth, and mailing address reported on the tax return.
5. Click "Continue" button.
6. Choose "**Return Transcript**". **Note:** Account Transcripts are not acceptable.
7. Select the tax year requested (2020).
8. Click "Continue" button
9. **Transcripts arrive in 5 to 10 calendar days at the address the IRS has on file for you.**
10. Submit the tax return transcript to the Financial Aid Office (*tax return transcripts are double-sided; if copying or faxing; be sure to submit both sides*) and include the student's Banner ID on each page.

OPTION 2: Request the IRS Tax Return Transcript by Phone

Caution: *if your address has since changed since filing your taxes, this method is not recommended as the transcript may be mailed to your old address.*

1. Call 1-800-908-9946 and follow the voice prompts.
2. You will need the taxpayer's social security number (SSN) or individual tax payer identification number (ITIN), date of birth, and mailing address reported on the tax return.
3. Choose "**Return Transcript**". **Note:** Account Transcripts are not acceptable.
4. Choose the tax year requested (2020).
5. **Transcripts arrive in 5 to 10 calendar days at the address the IRS has on file for you.**
6. Submit the return transcript to the Financial Aid Office (*tax return transcripts are double-sided; if copying or faxing; be sure to submit both sides*) and include the student's Banner ID on each page.

OPTION 3: Print your IRS Tax Return Transcript from the IRS Website

1. Go to <https://www.irs.gov/individuals/get-transcript>
2. Click on "**Get Transcript Online**".
3. If you do not have an account with the IRS, you will need to create one.
 - a. **Parents** of dependent students: if required to submit tax transcripts, you must create your own IRS account.
 - b. **Students:** if required to submit tax transcripts, you must create your own IRS account. 2
4. You must have some credit history for the IRS to confirm your identity. If the IRS cannot confirm the user's identity, an online account will not be created, and the user will need to use another method to obtain the transcript.
5. Once you create an account, you will be able to view, print, or download your IRS tax return transcript.
6. Choose "**Return Transcript**". **Note:** Account Transcripts are not acceptable.
7. Choose the tax year requested (2020).
8. Submit the return transcript to the Financial Aid Office (*tax return transcripts are double-sided; if copying or faxing; be sure to submit both sides*) and include the student's Banner ID on each page.

Upon receipt of the Tax Return Transcript, clearly print the student name and Berklee student ID number on the top of each page.

Please submit your document(s) through our secure Dropbox, and enter your student ID in the "Name" field. The link to the Dropbox is <https://www.dropbox.com/request/P7SCCWzlj168LczuQWXz>.