u∗aspire

Downloading a tax transcript

If you are selected for verification, colleges can request that you submit a tax transcript. A tax transcript must be ordered directly from the IRS. Below are instructions for electronically downloading a tax transcript. <u>Click here if you prefer to</u> <u>watch video instructions</u> on downloading a tax transcript.

In order to download a tax transcript, you (the tax filer) will need to already have or be able to create an IRS account. To create an IRS account the tax filer needs to provide the following information:

- social security number, date of birth, filing status and mailing address from latest tax return
- access to email account
- personal account number from a credit card, mortgage, home equity line of credit or car loan
- a mobile phone with the tax filer's name on the account

<u>Click here to watch video instructions</u> on creating an IRS account. The rest of this guide walks through the process to download a tax transcript **after** the account has already been created.

Step 1: Go to the website irs.gov and click "Get Your Tax Record".



Step 2: Select "Sign into your online account".



Step 3: If you already have an ID.me account, sign in now. Or, create an ID.me account If you are a new user.

IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your p
ID.me is an account created, maintained, and secured by a technology provider.
If you don't have an ID.me account, you must create a new account.
Sign in with an existing account Sign in with ID.me
OR
Create a new account
ID.me Create an account

Step 4: Complete authentication.

COMPLETE Y	OUR SIGN IN
1-2	3
Receive a co	de by phone
Ŀ	Ø
Text me	Call me
You will receive a code a	t the following number
(***) ***-*609	
If you've changed phone i when you previously authentication, please up	numbers or carriers from r set up multi-factor adate your settings here.
Cont	inue

Step 5: If the college asked you to enter a "Customer File Number" you would enter it here.



Step 6: For transcript type, choose "2023" in the "Return Transcript" box.



Step 7: Your 2023 tax transcript should download immediately. Save a copy in a safe place and follow the instructions from your college(s).

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This Product Conta:	ins Sensitive Taxpayer Data
	Request Date: 02-26-2025 Response Date: 02-26-2025 Tracking Number:
Tax Re	turn Transcript
	SSN Provided: Tax Period Ending:
The following items reflect the am the amount as adjusted (PC), if app activity on the account.	ount as shown on the return (PR), and plicable. They do not show subsequent
	55N:
NAME(S) SHOWN ON RETURN:	SPOOSE SSN:
ADDRESS:	
FILING STATUS:	
FORM NUMBER:	
CYCLE POSTED: RECEIVED DATE:	
REMITTANCE:	
EXEMPTION NUMBER:	



If you are unable to order the transcript online, please reach out to your uAspire advisor for alternative options.