

# Mountwest Community and Technical College

## Instructions for Requesting IRS Tax Return Transcripts

### TAX FILERS:

#### IRS Data Retrieval Tool Process

- 1) Log into FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
- 2) Select "Make FAFSA Corrections"
- 3) Navigate to the Financial Information section of the form.
- 4) Follow the instructions to determine if eligible to use the IRS Data Retrieval Tool
- 5) If eligible, transfer 2017 IRS tax information into the FAFSA.
  - You must use the tool and select the option to transfer the information into your FAFSA
- 6) Resubmit the FAFSA

If you are ineligible or decide not to use the IRS Data Retrieval Tool and your FAFSA is selected for verification, you must follow the directions below to request an IRS Tax Return Transcript.

#### IRS Tax Return Transcript Request Process

##### 1) Get Transcript Online

- Available on the IRS Web site at: <http://www.irs.gov/Individuals/Get-Transcript>
- Click "Get Transcript Online"
- If you have previously registered you may use the "Returning Users" option
- You may need to re-certify your account if you are a Returning User and have not logged in recently.
- If you are a "First Time User" you will need to verify your identity before proceeding.
- It may take up to 15 minutes to recertify or create your account.
- You will need a loan or credit card account to verify your identity and a mobile phone number that can receive a text message. Address and filing information must be identical to the address and filing information on your 1040 form.
- Once your account is created and verified you will be asked to select a reason you need a transcript.
- Choose "Income Verification"
- Select "Return Transcript" and tax year 2017 (you need to disable pop-up blockers in your browser).
- Your Tax Return Transcript will display as a PDF that you can print or download for later printing.

##### 2) Online Request Via Mail

- Available on the IRS Web site at: <http://www.irs.gov/Individuals/Get-Transcript>
- Click "Get Transcript Via Mail"
- Complete the required fields and click "continue"
- Choose "Return Transcript" under "Type of Transcript"
- Choose "2017" under "Tax Year" and click "continue"
- You should receive a message saying your tax return will be mailed in 5-10 days.
- Parents or students who filed "married filing jointly" must make the online mail request under the SSN and birth date of the **primary** taxpayer.

##### 3) Telephone Request

- Available from the IRS by calling 1-800-908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2017**”.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days.
- IRS Tax Return Transcripts requested by telephone **cannot be sent directly to a third party by the IRS.**

#### 4) Paper Request Form – IRS Form 4506T-EZ

- Download the form at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be your most current address. It is the address where the IRS Tax Return Transcript will be sent.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. *\*note*
- On line 6, enter “2017” to receive IRS tax information for the 2017 tax year that is required for the 2019-2020 FAFSA.
- The tax filers must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

\*Note: If using the paper form to have your IRS Tax Transcript mailed directly to the school, parents of dependent children should be aware that we may be unable to match your Tax Transcript to your dependent student, particularly if their last name differs from yours. We suggest you use the online request, add your dependent student’s name to the form and forward the form to the school.

### NON-TAX FILERS

- If you, an independent student, (or your parents if you are a dependent student) did not file a 2017 Tax Return you must provide a Verification of Non-Filing Letter for 2017 from the IRS for the 17-18 aid year.
- You obtain a Verification of Non-Filing Letter by using the IRS Form 4506-T
- <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Be sure to check the box on line 7 indicating “Verification of Non-Filing”.
- You will not be able to use the “Get Transcript” by Mail, by Telephone, or by using the 4506 form to request this letter. You must use form 4506-T.
- You may request a Verification of Non-Filing Letter using the “Get Transcript Online” Option from the IRS: <https://www.irs.gov/individuals/get-transcript>
- If you are unable to obtain verification of non-filing please contact a Financial Aid Counselor at Mountwest.