

# Mountwest Community and Technical College

## Instructions for Requesting IRS Tax Return Transcripts

### TAX FILERS:

#### IRS Data Retrieval Tool Process

- 1) Log into FAFSA at <https://studentaid.gov/h/apply-for-aid/afsa>
- 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 2018 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: <https://www.irs.gov/individuals/get-transcript>
- Click "Get Transcript Online"
- To register and use this service you need:
  - your SSN, date of birth, filing status and mailing address from latest tax return,
  - access to your email account,
  - your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
  - a mobile phone with your name on the account.
- Once account registration is complete a PDF file of your Tax Return Transcript will be able to display.
- Print this document and sign it.

##### 2) Online Request Via Mail

- Available on the IRS Web site at: <https://www.irs.gov/individuals/get-transcript>
- Click "Get Transcript by Mail"
- Complete the required fields and click "continue"
- Under "Select Transcript Type", choose "Return Transcript"
- Under "Select Tax Year", choose "2018" 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 tax payer.

##### 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 “**2018**”.
- 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 from the time the IRS receives the request.
- 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

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T. Download the form at <https://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 the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- On line 6, enter “2018” to receive IRS tax information for the 2018 tax year that is required for the 2020-2021 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return. (Be sure to check the small box above the signature to indicate you have authority to sign form)
- 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.

### NON-TAX FILERS

- If you (or your parents if you are a dependent student) did not file a 2018 Tax Return you (and your parents) must provide a Verification of Non-Filing Letter for 2018 from the IRS for the 20-21 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>