How to Request a Tax Transcript and Nonfiling Letter

- ❖ For the 2020-21 school year, students may be asked to provide copies of their, their spouse, or their parent's 2018 Federal Tax Transcripts or proof of Nonfiling Letter.
- ❖ For the 2019-20 school year, students may be asked to provide copies of their, their spouse, or their parent's 2017 Federal Tax Transcript or proof of Nonfiling Letter.

Option 1

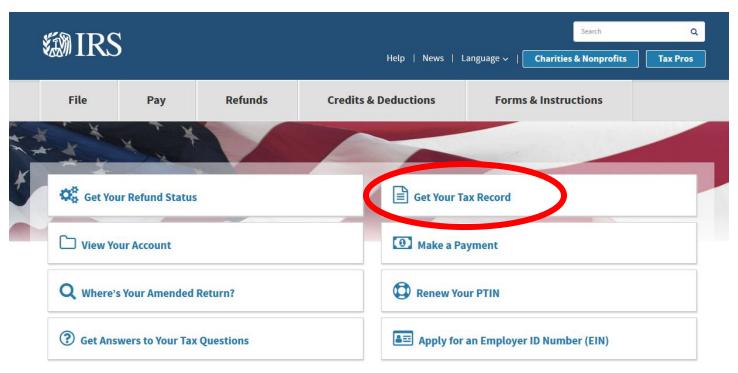
Request Online

This option will allow you to view, print, or download your transcripts online. You will register to create a username and password so that you can return to your documents at any time.

What 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
- A mobile phone with your name on the account

Step 1: Go to the IRS website www.irs.gov and under Tools, select "Get Your Tax Record"



Step 2: Select "Get Transcript Online", make sure you have what you need to use the online tool

Request Online

What You Need

To register and use this service, you need:

- your <u>SSN</u>, 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.

What You Get

- · All transcript types are available online
- · View, print or download your transcript
- · Username and password to return later

Get Transcript Online

Request by Mail

What You Need

To use this service, you need your:

- SSN or Individual Tax Identification Number (ITIN),
- · date of birth, and
- · mailing address from your latest tax return

What You Get

- Return or Account <u>transcript types</u> delivered by mail
- Transcripts arrive in 5 to 10 calendar days at the address we have on file for you

Get Transcript by Mail

Step 3: Follow the remaining instructions to submit your request.

Be sure to select "Tax Transcript" when prompted for the appropriate tax year (the prior-prior year. Example: for the 2019-2020 school year, you would need to provide your 2017 Tax Return Transcript).

Option 2

Request by Mail

This option will allow you to complete an online form to request a tax transcript be mailed to you. You should receive a copy of the tax transcript in the mail within 5-10 business days.

What You Need for the Online Request

- Social Security Number of the tax filer or the ITTIN
- Date of Birth of the tax filer
- Mailing address from the tax filer's latest tax return

Step 1: Go to the IRS website <u>www.irs.gov</u> and under Tools, select "Get Your Tax Record" (See Option 1 Step 1 Above)

Request Online What You Need 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, credit or car loan, and

- · your personal account number from a credit card, mortgage, home equity loan, home equity line of
- · a mobile phone with your name on the account.

What You Get

- · All transcript types are available online
- · View, print or download your transcript
- · Username and password to return later

Get Transcript Online

Request by Mail What You Need To use this service, you need your: SSN or Individual Tax Identification Number (ITIN), · date of birth, and · mailing address from your latest tax return What You Get · Return or Account transcript types delivered by . Transcripts arrive in 5 to 10 calendar days at the address we have on file for you **Get Transcript by Mail**

Step 3: Follow the remaining instructions to submit your request.

Be sure to select "Tax Transcript" when prompted for the appropriate tax year (the prior-prior year. Example for the 2019-2020 school year, you would need to provide your 2017 Tax Return Transcript).

Option 3

Telephone Request

You can request a paper copy by phone to be sent to the mailing address listed on the original Tax Return you are trying to receive. You should receive the Tax Transcript within 5-10 business days

- **Step 1:** Call the IRS at 1-800 908-9946
- Step 2: Follow the prompts to enter the tax filer's Social Security Number and address
- Step 3: Select Option 2 and request the IRS Return Transcript for the specific tax year you are requesting
- **Step 4:** Ensure that your request is successfully validated

Option 4

Paper Request Form

This option is only recommended for students who are unable to retrieve their tax transcript of letter of nonfiling from the previous options. The 4506-T Form can take up to 30 days to process.

Step 1: Download the 4506-T Form at https://www.irs.gov/pub/irs-pdf/f4506t.pdf

Step 2: Request for the specific tax year you need

Step 3: Check boxes 7 and 8

Only check both boxes 7 and 8 if you worked that tax year; if you did NOT work, simply check box 7

Step 4: Sign and mail the mail the 4506-T Form to the IRS