

Instructions for Requesting a Federal Tax Return Transcript from the IRS

Submitting your FAFSA using the IRS Data Retrieval Tool (DRT) allows you to transfer information directly from the IRS to your FAFSA. For instructions on using the IRS DRT, go to <https://studentaid.ed.gov/sa/resources/irs-drt-text>. Tax filers who are unable to use the IRS Data Retrieval Tool can request an IRS tax return transcript free of charge from the IRS in one of four ways.

ONLINE REQUEST

- Go to the IRS website at: <http://www.irs.gov/Individuals/Get-Transcript> and select "Get Transcript Online". (Be sure to disable pop-up blockers).
- To use the online request service, you will need: (1) your social security number and date of birth, (2) your filing status and mailing address from your latest tax return, (3) an email account, (4) your credit card number or account number from an auto loan, mortgage, home equity loan or home equity line of credit, (5) a mobile phone with your name on the account. If you use a credit card number, it will **not** be charged.
- Click "Continue" and select "Higher Education/Student Aid" as the reason for requesting the transcript.
- For the type of transcript, select "Tax **Return** Transcript" (**not** "Tax **Account** Transcript") and select the appropriate tax year.
- A copy of your IRS Tax Return Transcript or Non-filing letter should now be displayed as a PDF file.

MAIL REQUEST

- Go to the IRS website at <http://www.irs.gov/Individuals/Get-Transcript> and select "Get Transcript by Mail".
- Enter the tax filer's social security number, date of birth, street address, and zip code. Use the address currently on file with the IRS, which is usually the address that was listed on the latest tax return filed. For a joint tax return, use the primary tax filer's SSN, date of birth and address.
- Click "Continue".
- For the type of transcript, select "Tax **Return** Transcript" (**not** "Tax **Account** Transcript") and select the appropriate tax year.
- If successfully validated, tax filers will receive a paper IRS Tax Return Transcript or Non-filing letter within 5 to 10 business days. Tax Return Transcripts requested online can only be mailed to the address on file with the IRS.

TELEPHONE REQUEST

- Call the IRS at 1-800-908-9946.
- Tax filers must follow prompts to enter their social security number and numbers in their street address.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter the year desired.
- If successfully validated, tax filers will receive the paper transcript within 5 to 10 business days.

PAPER REQUEST (IRS Form 4506-T)

- Download a PDF for the 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- Complete lines 1-4, following the instructions on page 2 of the form.
- Do not fill in line 5 to have the form sent to a third party. Have it mailed to your address.
- On line 6, enter the tax form number requested.
- Check the box on **6a Return Transcript** to request the IRS Tax Return Transcript.
- On line 9, enter the appropriate date that has been requested (12/31/2023).
- Sign and date the form and enter phone number of taxpayer
- Mail the 4506-T to the appropriate address listed on page 2 of the form.
- Tax filers should receive their transcripts/letters within 10 business days from the date the IRS receives the form.