Requesting an IRS Tax Return Transcript

If you filed 2021 income taxes and are unable or choose not to use the IRS Data Retrieval Tool through FAFSA you may request an IRS Tax Return Transcript by using one of the two options:

1. Get a Transcript Online
    1. Go to the IRS website (https://www.irs.gov/)
    2. Select Get Your Tax Record
    3. Click on the blue Get Transcript ONLINE button
    4. First time users follow the steps to create an account. Returning users should log in using the user name and password previously created.
    5. Once logged-in select Higher Education/Student Aid from the drop-down box as the reason you need a transcript and enter your student ID number for your Customer File Number, then hit 'GO'.
    6. From the options given to you select the 2021 Return Transcript
    7. Your Return Transcript will open in a separate window. If it does not, you may need to change the pop-up settings on your browser.

2. Get a Transcript by Mail
    1. Go to the IRS website (https://www.irs.gov/)
    2. Select Get Your Tax Record
    3. Click on the blue Get Transcript by MAIL button
    4. Enter the primary tax payer's information; hit the grey Continue button
    5. Select Return Transcript and 2021, and provide your student ID number under Customer File Number
    6. Hit the grey Continue button
    7. If successfully validated, you can expect your requested Tax Return Transcript within 5 to 10 business days

3. Telephone Request
    1. Available from the IRS by calling 1-800-908-9946
    2. Follow the prompts and enter the primary taxpayer's SSN and the numbers in their street address. Generally, the address that was used on the latest tax return filed with the IRS
    3. Select Option 2 to request an IRS Tax Return Transcript and then enter 2021
    4. Provide your student ID number as your Customer File Number
    5. If successfully validated, you can expect your requested Tax Return Transcript within 5 to 10 business days

4. Paper Request Form—IRS Form 4506T-EZ or IRS Form 4506-T
    1. Download the [Form 4506-T](#) or [Form 4506T-EZ](#)
    2. Complete the form and mail or fax the completed form to the appropriate address or fax number provided on page 2. (If using form 4506-T make sure you select option (a) under section 6 for a "Tax Return Transcript")
    3. Provide your student ID number on line 5b for Customer File Number

Note: If you are requesting an IRS Tax Return Transcript from the IRS you must use the address currently on file with the IRS. Generally, the street address and ZIP Code on the latest tax return filed with the IRS by the tax filer. If your address has changed since you filed your last tax return and it doesn't match the IRS records. Don't use your old address. The transcript won't get forwarded to you.

You need to file [Form 8822 Change of Address](#) before you submit [Form 4506-T](#) or [Form 4506T-EZ](#). Generally, it takes four to six weeks to process a change of address.

Requesting a Verification of Non-Filing

*If you have never filed a return with the IRS you must use the IRS Form 4506-T.

5. Get an IRS Verification of Non-filing Letter by Mail
    1. Download the [Form 4506-T](#)
    2. Complete the form and mail or fax the completed form to the appropriate address or fax number provided on page 2. When using form 4506-T make sure you select option 7 "Verification of Non-filing"
    3. Provide your student ID number on line 5b for Customer File Number
6. Get an IRS Verification of Non-filing Letter Online
    8. Go to the IRS website (https://www.irs.gov/)) and select "Get Your Tax Record"
    9. Click on the blue Get Transcript ONLINE button
    10. First time users follow the steps to create an account. Returning users should log in using the user name and password previously created.
    11. Once logged-in select Higher Education/Student Aid from the drop-down box as the reason you need a transcript and enter your student ID number for your Customer File Number, then hit 'GO'
    12. From the options given to you select the 2021 Verification of Non-filing Letter
    13. Your Verification of Non-filing Letter will open in a separate window. If it does not, you may need to change the pop-up settings on your browser.

Using the IRS Data Retrieval Tool through FAFSA or Updating Your Filing Status

- Go to Federal Student Aid (https://studentaid.gov/h/apply-for-aid/fafsa); hit the blue Login button
- Choose 'I am the student' and then enter the student's FSA ID
- Click on the Make FAFSA Corrections link
- Enter your (the student's) FSA ID and create a save key
- Click on the Financial Information tab towards the top of the screen
- If you need to update your filling status, change the Will File to Already Completed
- Answer the questions to see if you are eligible to use the IRS DRT. If you can answer no to all these questions a blue Link to the IRS will appear.
- If eligible, click on the blue Link to the IRS button. If you are not eligible, refer to the instructions on how to order a Tax Return Transcript directly from the IRS
- Click OK. Once transferred to the IRS website, enter the tax filer's filing status, street address, and ZIP code. Use the address currently on file with the IRS. Generally, the street address and ZIP code included on the latest tax return filed with the IRS.
- Hit the grey Submit button. It will bring up your 2021 tax information
- Check the box indicating you want to transfer your tax information into the FAFSA
- Click on the grey Transfer Now button
- You will be brought back to the FAFSA website and will see confirmation that you have successfully transferred your 2021 IRS tax information.
- Click on the Sign & Submit tab at the top of the screen

Sign the FAFSA using your FSA ID, read the terms of agreement, agree to the terms of agreement and click on the blue Submit My FAFSA Now button. If a dependent, a parent must sign the FAFSA using the appropriate FSA ID as an electronic signature.