

How to Request a Tax Transcript

HOW TO REQUEST A TAX RETURN TRANSCRIPT FROM THE IRS:

1. Complete & Fax (or Mail) the IRS Form 4506-T, (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) or
2. Request a Tax Transcript from the IRS website:
 - a. To order a tax return transcript, simply go to <http://www.irs.gov>
 - b. On the home page click 'Get Your Tax Record.'
 - c. Choose how you would like to receive the transcript, either 'Get Transcript by Mail', or 'Get Transcript Online.'
 - d. If you chose to receive your transcript by mail, you will need the primary taxpayer's SSN, DOB, Street Address (IT MUST BE ENTERED EXACTLY as it appears on the tax return), and the Zip Code. Click 'CONTINUE.' If you chose to receive your transcript online, you will need the primary taxpayer's SSN, DOB, filing status, mailing address from the latest tax return, and access to your e-mail account. You will also need one of the following: your personal account number from a credit card, mortgage, home equity loan, home equity line of credit, or car loan. Finally, you will need a mobile phone with your name on the account.
 - e. Select the Tax Return Transcript and the appropriate tax year (check with your financial aid office to verify the required year) and click 'Continue.'
 - f. It typically takes 5 – 10 days to receive your Tax Return Transcript via mail to the address the IRS has on file for you. During peak processing times, it may take longer.

If you cannot get mail at the address the IRS has on file for you, you must submit the IRS Form 4506-T to get it sent to a different address.

VERIFICATION OF NON-FILING LETTER:

If you did not file taxes during the previous tax year, you will need to request a Verification of Non-Filing Letter. There are two options to request your letter –

1. Use the 'Get Transcript by Mail' option. This option is referenced above under HOW TO REQUEST A TAX TRANSCRIPT FROM THE IRS, line 2.d.
2. Complete a 4506-T Form (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) and fax or mail it to the IRS.

Common Reasons you may not be able to link your taxes:

- You don't know the EXACT address your taxes were filed under.
- Tax filer is married but filed separate returns (request Tax Transcript for both filers.)
- Tax filers married before completing the FAFSA but after filing taxes and filed separate returns (request tax transcript for both filers.)
- Tax filer was married when filing taxes but before the FAFSA was completed they were separated/divorced/widowed (request a Tax Transcript, submit W2's, submit notarized separation statement/divorce decree/death certificate to the Financial Aid Office.)

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