Need an IRS Transcript?

If you are required to submit tax documentation and financial information for the FAFSA or Dream Act Application process, please refer to the chart below to determine which tax year would be required.

<table>
<thead>
<tr>
<th>FAFSA/CADAA Aid Year and Tax/Financial Data</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Year</td>
<td>Tax Year Required</td>
</tr>
<tr>
<td>2018 – 2019 FAFSA or Dream Act Application</td>
<td>2016 Tax and Financial Information</td>
</tr>
<tr>
<td>2019 – 2020 FAFSA or Dream Act Application</td>
<td>2017 Tax and Financial Information</td>
</tr>
</tbody>
</table>

**WHAT'S NEW**

- A new transcript format is used that better protects your data and partially masks your personally identifiable information.
- The IRS will **no longer fax requests** to taxpayer or a third party when requested by phone, but will mail to the taxpayer’s address of record.

*Please allow 5 – 10 calendar days from the time the IRS received the request for mail delivery.*

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**Request Online**

Go to IRS.gov/transcript

What you need to download transcript immediately

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.

What you need to get transcripts by Mail

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

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**Request by Phone**

Call 1-800-908-9946 and follow the voice prompts for automated telephone request

**Transcripts Types Available by Phone**

- Tax Return Transcript

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**Request by Mail**

Go to IRS.gov/from4506T

Complete and print form, then mail it to the IRS

**Transcripts Types Available by Mail**

- Tax Return Transcript
- Record of Account Transcript
- Wage and Income Transcript
- Verification of Non-filing Letter

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**IRS Live Telephone Assistance** | M-F 7am-7pm | Individual: 1-800-829-1040 | TTY/TDD 1-800-829-4059
Verification of Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS
An individual, who is required to file an IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year, must provide:

- A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year;
- A copy of the IRS’s approval of an extension beyond the automatic six-month extension for tax year;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2018;
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year and,
- If self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year.

Individuals Who Filed an Amended IRS Income Tax Return
An individual who filed an amended IRS income tax return for tax year must provide:

- An IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A signed copy of the IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft
An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

<table>
<thead>
<tr>
<th>Current Year IRS Transcript Availability</th>
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</thead>
<tbody>
<tr>
<td>When your original return shows a ...</td>
</tr>
<tr>
<td>refund amount or no balance due,</td>
</tr>
<tr>
<td>balance due and you paid in full with</td>
</tr>
<tr>
<td>your return,</td>
</tr>
<tr>
<td>balance due and you paid in full after</td>
</tr>
<tr>
<td>submitting the return,</td>
</tr>
<tr>
<td>balance due and you didn’t pay in full,</td>
</tr>
</tbody>
</table>

For IRS Change of Address - Go to: https://www.irs.gov/faqs/irs-procedures/address-changes/address-changes
Example on How to fill out 4506-T to get a TAX RETURN TRANSCRIPT or VERIFICATION of NONFILING or WAGE & INCOME TRANSCRIPT

First M Last

123-45-6789

If married and filed joint, add spouse info here

First M Last, 123 Sac City, Apt 4, Sacramento, CA 95822

12/31/2016

12/31/2017

Sign Here

Today’s Date

916-123-4567