

## Instructions for obtaining IRS Tax documents

<u>Request Method</u>	<u>How</u>	<u>When</u>	<u>What you will need (to know/have)</u>	<u>Type Of Document</u>
<b>Mail</b>	Fill out an IRS form 4506-T <a href="https://www.irs.gov/pub/irs-prior/f4506t-2019.pdf">https://www.irs.gov/pub/irs-prior/f4506t-2019.pdf</a>	Takes 10 Business days by mail <b>(after the IRS receives Form 4506-T)</b>	<ul style="list-style-type: none"> <li><b>Address</b> on form must match exactly as it appears on most recent tax return /or employer W2, if you are a non-tax filer</li> </ul>	<ul style="list-style-type: none"> <li>Tax Return Transcript</li> <li>Record of Account</li> <li>IRS W-2 Wage and Income Transcripts</li> <li>Verification of Nonfiling</li> </ul>
<b>Call</b>	1-800-908-9946	Takes 5-10 Business days by mail	<ul style="list-style-type: none"> <li><b>Must live at address</b> that is on most recent tax return. PRESS 2. <i>Account transcript</i> is NOT acceptable for financial aid, request <b>"Return" transcript only</b></li> </ul>	<ul style="list-style-type: none"> <li>Tax return transcript</li> </ul>
<b>Online - IRS</b>	<a href="https://www.irs.gov/individuals/get-transcript">https://www.irs.gov/individuals/get-transcript</a>	<b>Immediately</b> NOTE: IRS online access can change and may not be reflected in this document	<ul style="list-style-type: none"> <li>You must know your SSN, date of birth, filing status and mailing address from latest tax return,</li> <li>your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and</li> <li>A mobile phone with your name on the account.</li> </ul>	<ul style="list-style-type: none"> <li>Tax Return Transcript</li> <li>Record of Account</li> <li>IRS W-2 Wage and Income Transcripts</li> <li>Verification of Nonfiling</li> </ul>
<b>Through FAFSA</b>	IRS Data Retrieval Tool (DRT) allows student or parent to link to IRS and transfer tax information directly onto FAFSA.	3-5 Business days If successful, the <b>IRS Tax Transcript will no longer be required on the E-services "To Do List"</b>	<ul style="list-style-type: none"> <li><b>❖ May not be able to link if:</b></li> <li>Student or parents who are married and filed as Married Filing Separately.</li> <li>You are married and filed Head of Household.</li> <li>Filed a Puerto Rican or foreign tax return.</li> <li>If you filed electronically in the last 3 weeks or 11 weeks by mail.</li> </ul>	<ul style="list-style-type: none"> <li>Tax Return Transcript</li> </ul>
<b>In Person</b>	To make appointment call the IRS office:  4330 Watt Ave, Sacramento, CA. 95821		<b>BY APPOINTMENT ONLY</b> call (844) 545-5640	<ul style="list-style-type: none"> <li>Tax Return Transcript</li> <li>Record of Account</li> <li>IRS W-2 Wage and Income Transcripts</li> <li>Verification of Nonfiling</li> </ul>

When filling out the **Form 4506-T**, please consider the following: **Do not use white out or write over a mistake. If you make a change, line out and initial the change. Beware of address lines!**

Print clearly and do not abbreviate words in your address. Only complete line 4, "previous address", if the address listed on your requested 1040 Form, W2, 1099 forms, is NOT your current address.

Mark box 8 for the Wages and Income Transcript (Form W-2, Form 1099 series etc.). Fill-in line 9 (Year or period requested) using the last day of the tax year requested. **(12/31/2019)**

Mail Form **4506-T** to the **Fresno** address listed on the back side of the form **if you lived in or had a business in California when that return was filed.**

NOTE: An IRS **2019** Tax Return Transcript or Record of Account Transcript with indication that **no record is found** is acceptable documentation to verify Nonfiling.

## Alternate Instructions for IRS Tax documents

Effective January 9, 2019

*IRS Income Tax Return Transcript:* Student (Spouse)/Parent(s) may submit a signed copy of the 2017 1040 income tax return, which the tax filer submitted to the IRS. The tax filer must sign the tax return or the tax preparer must provide his name and SSN, EIN, or PTIN number.

*Verification of Nonfiling* – Individuals are still required to obtain verification of Nonfiling (VNF) from the IRS. However, if the individual is unable to obtain VNF from the IRS, the individual must:

Submit a signed and dated statement certifying that the individual—

- Attempted to obtain the Verification of Nonfiling letter from the IRS or other tax authorities and was unable to obtain the required documentation; **and**
- Has not filed and is not required to file a 2017 income tax return.

*IRS Wage and Income Transcript:* Student (Spouse)/Parent(s) may submit 2017 IRS Form W-2 for each source of 2017 employment income received by the individual.