

## Instructions for obtaining an IRS Return Transcript, Or IRS Verification of Non-Filing Letter for the 2024-2025 Academic Year

If you were selected for verification and are required to provide income tax information, you must provide this information directly from the IRS. The two methods for doing this are detailed below. The first method is preferable (if you are able to use it), due to speed and ease of making the request. To use this method you must allow for processing periods, depending on how you submitted your information to the IRS.

- For electronically filed tax returns, you must wait 1 – 2 weeks after filing before your data will be available.
  - For tax returns filed by paper, you must wait 6 – 8 weeks after filing before your data will be available.
- A. If your income tax information was ineligible to be retrieved directly from the IRS, you may request a copy of your tax transcripts via the [Form 4506-T \(Rev. 6-2023\) \(irs.gov\)](https://www.irs.gov/individuals/get-transcript).
- B. Your tax information may not have been eligible due to one of the following reasons:
- a. Tax return filing status is 'Married Filing Separately'
  - b. Marital status has changed since December 31, 2022
  - c. Are required to file, but have been granted an extension by the IRS. Submit the following:
    - i. A copy of the 2022 form 4868
    - ii. A **signed and dated** written income statement that indicates the estimated Adjusted Gross Income and Taxes Paid for 2022. These do not need to be from an accountant or IRS Office.
    - iii. All 2022 W2(s). If self-employed include that information in the income statement.
  - d. Filed a Puerto Rican or foreign tax return – you will need to submit a signed copy of your tax return.

**Return Transcript (or) Verification of Non-Filing Letter**– If your information is ineligible to be automatically placed in the FAFSA, you **must** submit an IRS Tax Return Transcript from the IRS to our office. Most requests are processed within 10 days. To request:

- A. You may request a Return Transcript online through the IRS website by going to <http://www.irs.gov/individuals/get-transcript>. You must have access to a valid email address, a text-enabled phone (no pay-as-you-go), or specific financial account numbers. Complete the required information and a Tax Transcript will be ordered.
- B. Call the IRS at 1-800-908-9946 (on the automated menu):
  - a. Enter and verify your Social Security Number
  - b. Enter in your street address number
  - c. Select Option #2 to request a Return Transcript
  - d. Enter and verify the year of your needed Return Transcript (for a 2024-2025 verification, request the 2022 tax year)
- C. You may complete Form 4506T: *Request for Transcript of Tax Return (or) Verification of Nonfiling Letter*, and mail it or fax it to the address/phone number indicated on the form. To request a Return Transcript check **box 6a**. Requesting a Return Transcript is free of charge. You can print this form at [https://www.irs.gov/site-index-search?search=4506-T&field\\_pup\\_historical\\_1=1&field\\_pup\\_historical=1](https://www.irs.gov/site-index-search?search=4506-T&field_pup_historical_1=1&field_pup_historical=1). In **box 5b** please enter your student ID number.

To contact the IRS for general questions call 1-800-829-1040 or visit their website: [www.irs.gov](http://www.irs.gov).