



How to Obtain a Tax Transcript

If you have been selected for verification, copies of personal tax returns are no longer an acceptable form of income documentation. Documentation of items found on a tax return will need to be submitted either by using the IRS Data Retrieval option on the FAFSA website (preferred method) or requesting a tax return transcript from the IRS.

NOTE: Make sure you request a Tax Return Transcript. Do not request a Tax Account Transcript or Record of Account because they cannot be used for financial aid verification purposes.

Online Request-Mail Option:

- Go to www.irs.gov
- Click "Get Your Tax Record" located on the home page
- Click "Get Transcript by Mail"
- Enter your Social Security Number, date of birth, and street address. Make sure the address you use matches what was reported on your most recent tax return. For example, Street vs. St will not match.
- Select "Return Transcript" as type of transcript and choose the year (i.e. 2016 for 2018-2019 FAFSA, 2017 for 2019-2020 FAFSA).
- You can expect the paper IRS Tax Return Transcript at the address requested within 5-10 business days.

Telephone Request:

- Call the IRS Transcript Order Line at 1-800-908-9946 (7:00 a.m. – 7:00 p.m.)
- Enter and verify your Social Security number.
- Enter and verify the numbers in your street address. Make sure that the address you use matches what was reported on your most recent tax return. For example, Street vs. St will not match.
- Select option "2" to request a Tax Return Transcript.
- Choose the year for which you would like a tax transcript (i.e. 2016 for 2018-2019 FAFSA, 2017 for 2019-2020 FAFSA)
- You can expect to receive a paper IRS Tax Return Transcript at the address requested within 5 to 10 days.

By Mail-Paper Request Form - IRS Form 4506-T

- Download the IRS Tax Form 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS.

- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. UNC STRONGLY prefers you have the transcript mailed to you and that you then submit it to our office. You will need to make sure the student's name and student ID # are on the transcript.
- On line 6, enter "2016" for the 2018-2019 FAFSA; "2017" for the 2019-2020 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506-T to the appropriate address (or FAX number) provided on page 2 of Form 4506-T.
- You can expect to receive your transcript within 5 to 10 days from the time the IRS receives and processes your signed request.