

IRS Methods for Tax Return Transcript Requests

Federal regulation allows the use of a signed & dated copy of a 2021 federal income tax return (Form 1040) with schedule 1, schedule 2 & schedule 3 federal forms for 2023-2024 student aid verification. There are two other acceptable methods to provide federal tax data to the financial aid office; Method 1 or Method 2 (outlined below). If you have not filed a 2021 Federal Tax Return, then use Method 3.

METHOD 1

FAFSA-IRS Data Retrieval Tool (IRS DRT)

1. Go to <https://fafsa.gov> and log in, select the 2023-2024 FAFSA
2. Click “Make Corrections”
3. Create a Save Key.
4. Click on the section “Student Financials” and/or “Parent Financials”; depending if you are the student or parent. Select “Already Completed” for the tax return filing status & answer the eligibility questions.
5. If you are eligible to use the IRS Data Retrieval Tool, you will then be prompted to “Proceed to the IRS.” If you are not eligible to use the IRS Data Retrieval Tool, follow the instructions for METHOD 2.
6. Enter the requested information on the IRS page & click “Submit.” Remember to enter your address **EXACTLY** as it appears on your taxes. Check your name & how you filed to reflect how it is on your taxes as well.
7. Check the box “Transfer My Tax Information into the FAFSA” & click “Transfer Now.”
8. Continue to the “Sign & Submit” tab when all corrections have been made. When you click “Continue” a box will appear to make changes to another section, click on “No Thanks, Continue.” Check the box to agree to the terms & click “Sign This FAFSA Form.” After those that need to sign this FAFSA form have signed, click “Submit My FAFSA Form Now.”

METHOD 2

IRS Tax Return Transcript

Request Online

Note: To get a transcript online, you must have access to a valid e-mail address, a text-enabled mobile phone (pay as you go plans cannot be used), ID.me account, & specific account numbers such as credit card, home mortgage or auto loan. You will also want your Federal Tax in front of you as the address has to be EXACTLY how it appears on your taxes. **Creating an ID.me account will require a selfie (smartphone or computer with a webcam) AND photo I.D (driver’s license, state ID, passport, or passport card).**

1. Go to www.irs.gov
2. Click “Get Your Tax Record”
3. Click “Get Transcript Online” & click “Create Account” to create a login OR login if you have created one in the past. If you are unable to access an online transcript, you will need to “Get Transcript by Mail” & follow the prompts.
4. After you successfully verify your identity & created a secure user profile OR are logged in, click continue.
5. Select “Higher Education/Student Aid” as the reason you need a transcript.
6. Under “Return Transcript” select “2021,” you will be able to print it out if you can request it online.
7. Once you get the transcript, write the filer’s name, student’s name & ACC Student ID number on the top page.
8. Submit the Tax Return Transcript to the Financial Aid Office.

Request by Phone

1. Call 1-800-908-9946
2. Wait for the prompt that asks you for your Social Security Number & Address (as currently on file with the IRS)
3. Select “Option 2” to Request an IRS Tax Return Transcript & then enter “2021” for the year.
4. Once you receive it in the mail, write the filer’s name, student’s name & ACC Student ID number on the top page.
5. Submit the Tax Return Transcript to the Financial Aid Office.

METHOD 3 Verification of Non-filing Letter

Important!! If you are married & your spouse did not file a 2021 federal tax return, they will also need to request a Verification of Non-filing Letter of their own.

Request Online

Note: To use this online method, you must have access to a valid e-mail address, a text-enabled mobile phone (pay as you go plans cannot be used), ID.me account, & specific account numbers such as credit card, home mortgage or auto loan. **Creating an ID.me account will require a selfie (smartphone or computer with a webcam) AND photo I.D (driver's license, state ID, passport, or passport card).** If you cannot use the online function, go to Request by Mail or Fax found below.

1. Go to www.irs.gov
2. Click “*Get Your Tax Record*”
3. Click “*Get Transcript Online*” & click “Create an Account” to create a login OR login if you have created one in the past. If you are unable to access an online transcript, you will need to request a transcript by completing Form 4506-T by Mail or Fax (see below).
4. After you successfully verify your identity & created a secure user profile OR are logged in, click continue.
5. Select “Higher Education/Student Aid” as the reason you need a transcript.
6. Under “*Verification of Non-filing Letter*” select “2021,” you will be able to print it out if you can request it online.
7. Once you get the letter, write the filer’s name, student’s name & ACC Student ID number on the top page.
8. Submit the letter to the Financial Aid Office.

Request by Mail or Fax

1. Go to www.irs.gov
2. Under Forms & Instructions click “Forms & Instructions,” click on “Form 4506-T.”
3. Complete the Form 4506-T, by filling in lines 1-4 as appropriate, be sure to check box 7, on line 9 enter 12/31/2021 & then check the box that states “*Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.*” After form has been completed, sign & date the form.
4. On the second page of the 4506-T, look under “Chart for all other transcripts” to mail or fax it to the address or fax number designated based on the state you would have filed in 2021 had you been required to file. If you did file your taxes, you must utilize Method 1 or Method 2 instead.
5. Once you get the Verification of Non-filing Letter from the IRS, write the filer’s name, student’s name & ACC Student ID number on the top page.
6. Submit the letter to the Financial Aid Office.