

How to Request Your Federal Tax Transcript

SELECTED FOR VERIFICATION?

If you have been selected for verification, you will need to submit additional documentation to verify income. One option is to request a copy of your Tax Return Transcript from the IRS.

To request online:

1. Go to <u>www.irs.gov</u>. Under Tools, select "Get a tax transcript."



 To order your tax return transcript, select "Get Transcript Mail."



 If you have never set up an IRS login, read the popup and click "OK"; then click on "Create an Account." If you have already created an account, skip to step #8.

Office of Financial Aid Services



4. Enter your first name, last name, email address, confirm email address and then click on, "Send Email Confirmation Code." This is the first step in a six step process.

	MIRS	
	Sign Up: Step 1 of 6	
	All fields are required.	
	First Name	
	Last Name	
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5. The IRS will immediately email you a confirmation code. Retrieve your confirmation code by viewing your email account in another browser window. If you close the IRS website you will have to restart the process. The code will expire after 30 minutes. Enter your 8 digit confirmation code and click on "Verify Email Confirmation Code."

	Sign Up: Step 2 of 6
he popup ount." If	Retrieve your confirmation code by viewing your email i Do not close this window, or you will have to restart the
o step #8.	All fields are required. Do not close or navigate away from this page until your in Confirmation Code' button at the bottom of the page to continue.
	First Name
OR AUTHORIZED USE ONLY	Last Pares
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0	GANGEL VERIFY LINAL CONFIRMATION CODE
p 509.527.5178	f 509.524.2098 finaid@whitman.edu



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6. If you filed as married filing jointly, the account setup requires the primary tax filer's (the person who appears in line one of the tax form's) information. Enter the personal information required. At this step, you can choose to sign in as a guest by checking the box at the bottom of the screen. Once the information is entered, click "continue."

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kocial I	Security Number (33N) or Individual Tax ID Number (ITIN).	
Date of Month	rBanta th → Day → Ywaar	

- Answer the identity verification questions and click "continue".
- Once you are logged in and/or your account is set-up, select "Higher Education/Student Aid" as the reason for your request. This will guide you to the Return Transcript section. Then, select the appropriate year and download your transcript.

Get Transcript

Higher Education/Student Aid	FEMA/Disaster Related	© Sta
Mortgage Related	State Licensing	© Inc
Federal Tax	Small Business Loan	O He
Immigration	Housing Assistance	© 0#
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Unable to request your federal tax transcript online?

You can request your tax return transcript by mail.

To order by mail:

- Complete Form 4506T-EZ to order a copy of your Tax Return Transcript by mail. The form can be found on the IRS website: www.irs.gov/pub/irs-pdf/f4506tez.pdf
- 2. Fill the form in completely, selecting the appropriate year(s) needed.
- 3. Mail or fax the form to the appropriate IRS address (shown on the instructions page of the form).

You may also be required to submit your W-2 forms . . .

If Whitman requested W-2 forms and you are unable to locate some or all of your W-2's, you can order a W-2 transcript from the IRS.

To order online:

Follow the instructions above for ordering a tax return transcript online. Once you are logged into your account, be sure to select "Wage & Income Transcript" at the bottom.

To order by mail:

You may complete Form 4506-T, selecting the "W-2 Transcript" option and mail it to the address indicated on the form. You should receive your transcript within 10-15 business days. (Form 4506 is available at <u>www.irs.gov/pub/irs-pdf/f4506t.pdf</u>).