

Instructions for Requesting Tax Documents from IRS

IRS Data Retrieval Tool

1. Go online to <https://studentaid.gov/h/apply-for-aid/fafsa>
2. Click on “Login”
3. Choose “enter your (the student’s) FSA ID”
 - If you previously submitted a FAFSA for the academic school year, then Select “Make Corrections”
4. Navigate to the “Financial Information” tab
5. Select that you (or your parents) have “Already Completed” taxes. Answer the questions related to filing status.
6. Click the “Link to the IRS”
 - If you’re submitting a correction, then click the “View Options to Link to the IRS”
7. Choose “Proceed to IRS Site”
8. Complete by entering all information *exactly* as it appears on your tax return
9. Click “Submit”
10. Review the information for accuracy, check the box next to “Transfer my Tax Information”, and click “Transfer Now”
11. Go to the end of your FAFSA, agree to the terms, and sign with your FSA ID
12. Click “Submit”

IRS Tax Return Transcript

- Go online to www.irs.gov
- Select “File”
- Under the “Individuals” side-bar, select “Your Information”
- Under the “Your Information” side-bar, select “Tax Record (Transcript)”
- Select “Get Transcript Online” to request a PDF copy of your Tax Return Transcript
 - If you have an existing IRS username, you will need to create a new **ID.me** account as soon as possible.
 - If you are a new user, you will need to create an account with **ID.me** to request a Tax Return Transcript.
- If you are unable to use “Get Transcript Online”, select “Get Transcript by Mail” to have your Tax Return Transcript mailed to you. Please note this option takes 5-10 business days to be mailed.
 - Follow the prompts to request your transcript by mail

If you are unable to request your transcript online, then you may call to have your transcripts mailed to you at 800-908-9946.

Wage and Income Transcript

1. Go online to www.irs.gov
2. Select “File”
3. Under the “Individuals” side-bar, select “Your Information”
4. Under the “Your Information” side-bar, select “Tax Record (Transcript)”
5. Select “Get Transcript Online” to request a PDF copy of your Wage & Income Transcript
 - If you have an existing IRS username, you will need to create a new **ID.me** account as soon as possible.
 - If you are a new user, you will need to create an account with **ID.me** to request a Tax Return Transcript.
 - If you are unable to use “Get Transcript Online”, select “Get Transcript by Mail” to have your Tax Return Transcript mailed to you. Please note this option takes 5-10 business days to be mailed.
 - Follow the prompts to request your transcript by mail

If you are unable to request your transcript online, then you may call to have your transcripts mailed to you at 800-908-9946.

- You may also schedule an appointment at your local Tax Payer Assistance Center in Georgia to receive your tax documents in person. Follow the link below to find an office near you.
<https://www.irs.gov/help/contact-my-local-office-in-georgia>

Verification of Non-Filing Letter

1. Go online to www.irs.gov
2. Select “File”
3. Under the “Individuals” side-bar, select “Your Information”
4. Under the “Your Information” side-bar, select “Tax Record (Transcript)”
5. Select “Get Transcript Online” to request a PDF copy of your Verification of Non-Filing Letter
 - If you have an existing IRS username, you will need to create a new **ID.me** account as soon as possible.
 - If you are a new user, you will need to create an account with **ID.me** to request a Tax Return Transcript.
 - If you are unable to use “Get Transcript Online”, select “Get Transcript by Mail” to have your Tax Return Transcript mailed to you. Please note this option takes 5-10 business days to be mailed.
 - Follow the prompts to request your transcript by mail
 - If you are unable to use “Get Transcript Online”, select “Get Transcript by Mail” to have your Verification of Non-Filing Letter mailed to you. Please note this option takes 5-10 business days to be mailed.

- If you are unable to use the “Get Transcript Online” and “Get Transcript by Mail”, you will need to complete and submit an IRS Form 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) to the IRS. **Please check box 7 to request a Verification of Non-Filing Letter.**
- You will need to indicate the tax year requested, for example December 31, 2021 in box 9. This form will either need to be mailed or faxed depending on the option requested.