



## **Tax Information Instructions**

### **Tax Return Transcript Request**

There are three ways to order a free copy of your Tax Return Transcript from the IRS. Tax filers who use an ITIN to file their taxes will need use the request by mail option.

**Online** at: <https://www.irs.gov/individuals/get-transcript>

1. Click "Get Transcript Online"
2. Enter your Social Security Number, Email address, filing status, financial account number (i.e. Credit Card, home mortgage, or auto loan), and mobile phone number.
3. Select Tax Return Transcript for the tax year being requested.
4. If all information matches, view and print your IRS Tax Return Transcript.

Note: First Time Users: click "Get Started," confirm your identity, and verify your email confirmation code. If you are not able to do this, you will need to request your Federal Tax Return Transcript by Mail or Phone.

**Request By Phone** at: (800) 908-9946

1. Provide your Social Security Number
2. Enter the number of the address used to file your most recent tax return, and Press "2" 3. Enter the tax year being requested, for example: "20XX," and Press 1. You will receive your transcript within 5-10 days.

**Request By Mail** using: IRS Form 4506-T: <https://www.irs.gov/uac/about-form-4506t>

1. Print and complete lines 1-4
2. Enter tax form number on line 6, and Select box 6a
3. Include "12/31/20XX" for the year or period requested
4. Mail or fax the form to the IRS. See page 2 of Form 4506-T for instructions.

### **Special Circumstances**

What if my parent(s) or my tax filing circumstances are not listed above? Depending on your circumstances please review the documents accepted by our office below.

#### **Foreign Tax Return filers:**

Please provide a signed and translated copy of your or your parent's Foreign Tax Return with currency figures converted to U.S. dollars.

#### **Amended Federal Tax Return:**

- Tax Return Transcript; and Signed copy of IRS form 1040X OR
- Record of Account Transcript (optional)

### **IRS Verification of Non-Filing Letter**

Note: If you have never filed a Federal Tax Return, you will need to use the Request by Mail option to obtain a Verification of Non-Filing Letter. See instructions below.

#### **Request Online:**

1. Available on the IRS website at <https://www.irs.gov/individuals/get-transcript>
2. Click "Get Transcript Online."
3. Returning Users: Enter your Username and click "Log in" and proceed to Step 7.
4. First Time Users: click "Get Started" (You will need to confirm your identity, credit, and have access to a mobile phone). Click "Yes" to all three to confirm. If you cannot confirm all three, you will need to request your Verification of Non-Filing by Mail.
5. Enter your first name, last name, and email address. Click on "Send Email Confirmation Code"
6. Retrieve and enter confirmation code. Click on "Verify Email Confirmation Code."
7. Enter your identifying information and enter the address exactly as listed on your latest tax return filed or the most recent address registered with the U.S. Postal Service. Click "Continue."
8. If your information matches, select the reason for your request: "Higher Education/Student Aid."
9. Select "Verification of Non-Filing Letter" for the tax year that it is being requested.

#### **Request by Mail:**

1. Download and Print IRS Form: <https://www.irs.gov/individuals/get-transcript>
2. Complete lines 1-4.
3. Please leave Line 5 blank, and have the IRS Non-Filing Verification Letter mailed to you directly to the address you provided on Line 3. Do not have the IRS mail the letter to UCSB.
4. Check the box on Line 7
5. Include "12/31/20XX" for the year or period requested.
6. Mail or fax the completed form to the IRS. See page 2 of Form 4506-T for instructions.

#### **No Social Security Number, Taxpayer Identification Number, or Employer Identification Number?**

- Submit a signed and dated statement certifying that you and/or your parent(s) do not have a Social Security Number, Taxpayer Identification Number, or Employer Identification Number; and
- Listing the sources and amounts of earnings, other income, and resources that supported the household for the appropriate tax year. Include any IRS Form W-2(s) when applicable.