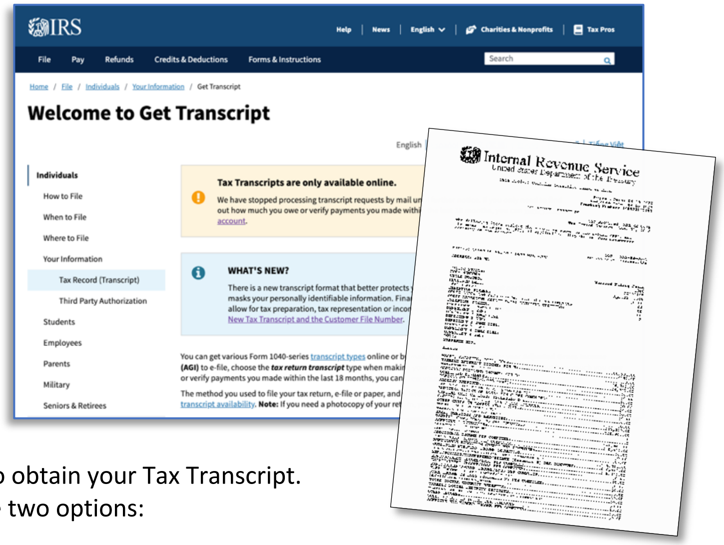
Obtaining an Online **IRS Tax Transcript**

Tax Transcript URL: https://www.irs.gov/individuals/get-transcript

A **Tax Transcript** is a summary of the Tax Return you submitted to the IRS. It contains important information that is used to verify your income to determine your eligibility for Workforce Tuition Assistance (FANTIC).

The transcript summarizes your federal tax return information and includes your **Adjusted Gross Income** (AGI) and the number of **exemptions** you claimed. They are available for the last three years you filed taxes with the IRS. While the last three years are normally available, you **must provide the most recent tax return transcript** with your FANTIC application.



This document will give you STEP-BY STEP directions to obtain your Tax Transcript. Normally, when you request a Tax Transcript there are two options:

(1) **BY MAIL: You can request that the transcript be mailed to you**. It will come to the address you used on the Tax Return it was based on unless you complete an IRS Form 4506-T. This may take 10 days to two weeks. You can also call an automated toll-free number to request a transcript by mail: (800) 908-9946. **Occasionally, the IRS will pause MAIL requests**, leaving only the online option. Always check the IRS website before requesting a transcript by mail.

(2) **ONLINE: You can get an online version of your Tax Transcript**, but you must provide information that is used to verify your identity. <u>If time is limited, this is the best option</u>. At the conclusion of the process you will be able to view a PDF of your Transcript that you can download and/or print. You will print out the PDF to submit with your FANTIC application.

To view **frequently asked questions about Tax Transcripts** go to:

https://www.irs.gov/individuals/get-transcript-faqs

For the purpose of this document, **we will provide instructions to obtain an online version** of your Tax Transcript.

Step #1 – Gather what you need…

Gather the <u>required</u> information needed to validate your identity <u>before</u> going online to apply for your transcript. You will be required to provide this documentation to prove your identity. **You will need:**

- ☐ ITEM #1: Your **Email Address;**
- ☐ ITEM #2: **Social Security Number** (SSN) <u>or</u> your **Individual Tax Identification Number** (ITIN);
- ☐ ITEM #3: Know your <u>**Tax Filing Status** on your Tax Return</u> Transcript you are requesting;
- ☐ ITEM #4: Know the <u>**Mailing Address** on your Tax Return</u> Transcript you are requesting;

ITEM #5 One **Financial Account Number** LINKED TO YOUR NAME: (You need <u>one</u> of the following):

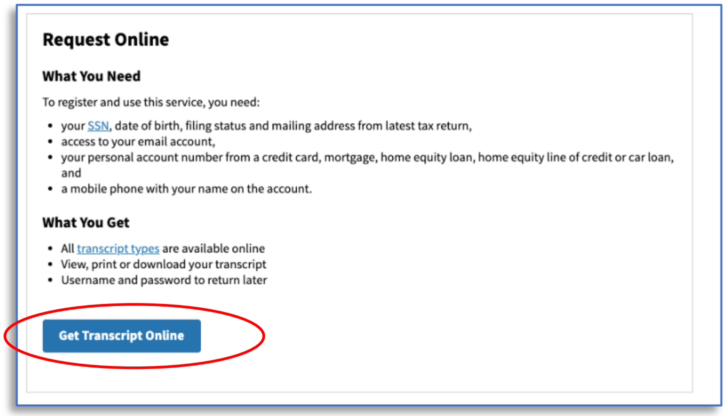
- ☐ **Credit Card**: Last 8 digits (Cannot use debit, corporate or American Express cards)
- ☐ **Student Loan Number:** Need student loan account number provided on your statement
- ☐ **Mortgage** or **Home Equity** / Line of Credit **Loan Number**
- ☐ **Auto Loan Number**

- ☐ ITEM #6: **Mobile Phone Number** (1) linked to your name (2) with texting capability.

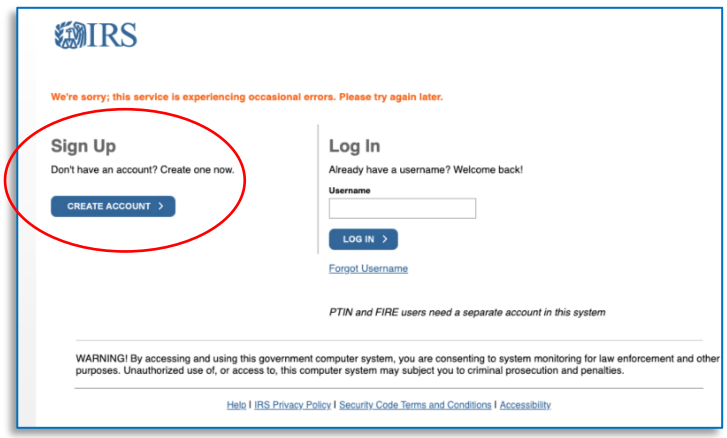
Step #2 – Create your IRS Online Account…

You will set up an Online Services Account. This is how you will log-in to your IRS account. You will use the information from Step #1 to set up your account.

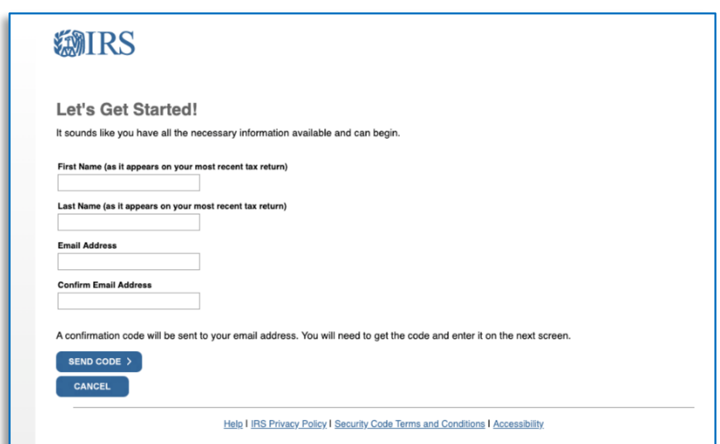
1. Go to: https://www.irs.gov/individuals/get-transcript
2. On the Welcome to Get Transcript page you see on page one, scroll down and you will see the box at right. You will click on Get Transcript Online.



3. On the next screen, you will be given two options:
   a. **Sign up**
   b. Log In
4. Unless you already have an account, select **CREATE ACCOUNT**.
5. The next screen will tell you about the registration. Click **CONTINUE**.
6. The next screen will tell you what information you will need (Step #1) and ask if you have it available. Click **YES**.



7. The next screen will tell you that you need a financial account to register and what accounts are eligible. (Step #1). Click **YES**.
8. The next screen will tell you that you need a mobile phone with texting enabled. As you progress through the setting up of your profile, a code will be sent to that phone that you will enter online. Click **CONTINUE**.
9. The next screen is the "**Let's Get Started**" page. Enter your **first name** and **last name** <u>as they appear on your tax return</u>. Enter your email address and enter it again to confirm. At the bottom, click **SEND CODE**. That code will be sent to the email address you entered.
10. Check your email. It may take a few minutes to arrive.



11. On the "**Check Your Email**" screen, enter the confirmation code that was emailed to you in the box. *The code is valid for 15 minutes.*

12. The next screen you will enter your personal information. It is important to remember; **this information must match the information on your tax return** exactly:

    a. First Name

    b. Last Name

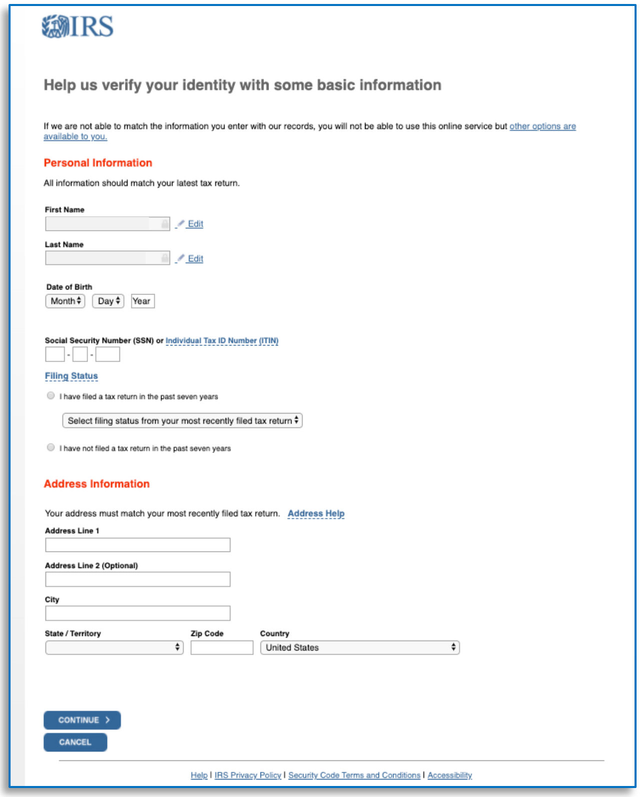
    c. Date of Birth

    d. Social Security Number

    e. The filing status of your most recent tax return. i.e. *Single, Married filing separately, Married filing jointly, etc.*

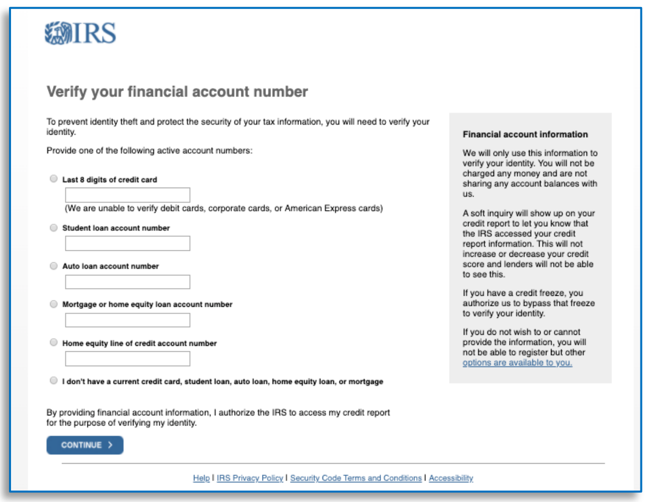
    f. Your Mailing Address

    g. Press **CONTINUE**



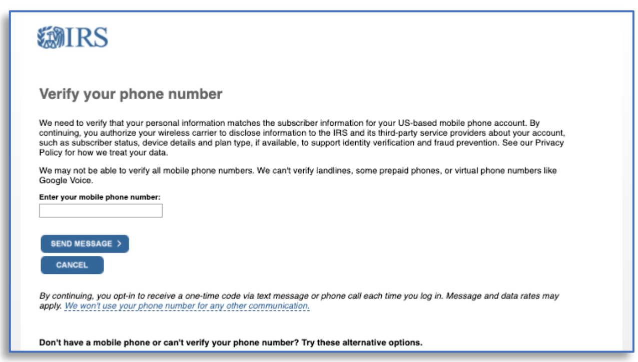
13. **Verify your financial account number**

    In this screen you will enter your financial information. This information is only used to verify your identity. You are not being charged any money nor are you sharing any account information with the IRS. They are cross-referencing the personal information you have given with the information (such as name and address) tied to the active account you select. You only select one of these. If you are using your credit card, only enter the last eight (8) numbers. For the other you will need the full account number. After you enter the information requested, press **CONTINUE**.

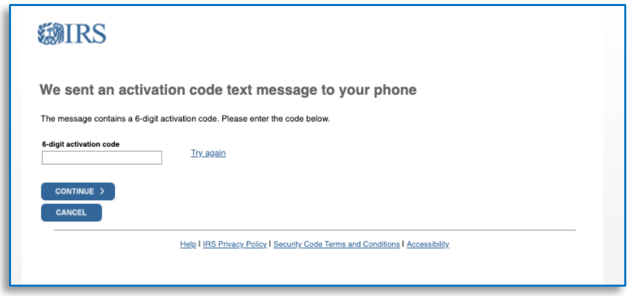


14. **Verify your phone number**

    This screen is where you enter **<u>your mobile phone number</u>** that can accept text messages. Enter the full number including area code and press **SEND MESSAGE**.



15. The next window will be where you will enter the activation code that will come to your mobile phone.



16. Your phone should receive a six-digit activation number. The code should come in a few minutes.

17. Enter the six-digit activation code and press **CONTINUE**.

18. The last step in creating your profile is to create your username, password, email (which should be what you entered earlier), a phrase you will recognize when you log in and a picture:

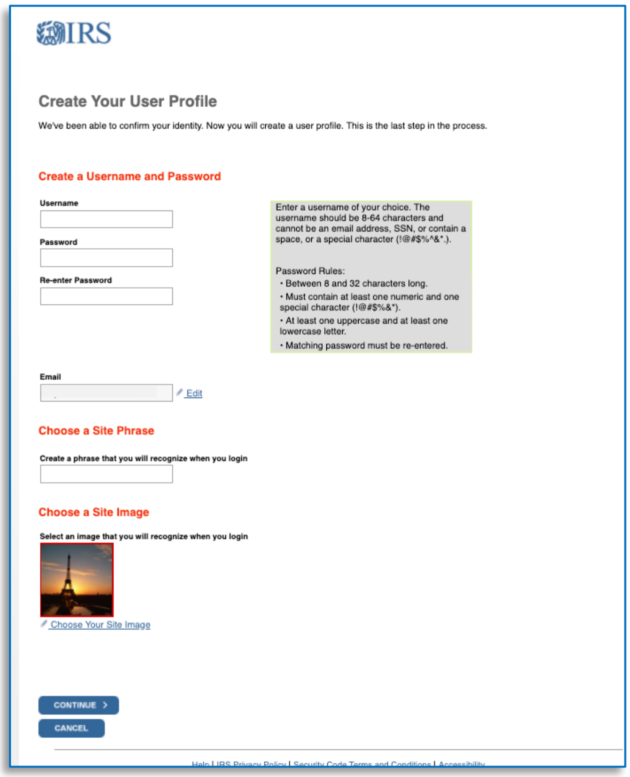
Username Rules

- Between 8-64 characters;
- Cannot be an email address;
- Cannot be your social security number;
- Cannot contain a space; and
- Cannot contain special characters such as !@#$%<>*.

Password Rules

- Between 8 and 32 characters;
- Must contain:
    - One number
    - One special character such as @#$%<>*
    - One upper case letter and one lower case letter.

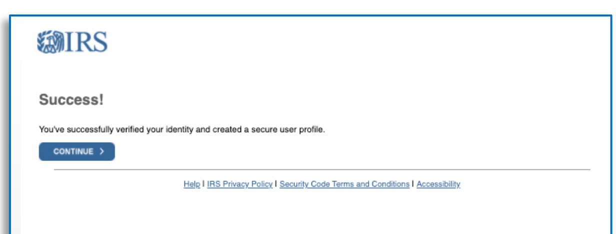
Choose a Site Phrase that you will see each time you log in to verify you this is your profile.



Choose a Site Image. Select an image, and if you click on "Choose your Site Image" there are other pictures.

Each time you log in you will see the phrase and picture and that helps you to know you are on the correct log-in site.

After you have entered everything, press **CONTINUE**. If you have entered anything incorrectly in the username or password, it will take you back and not allow you to continue until you correct it. Be careful when you enter your password as both have to match exactly.



19. If you have entered everything correctly, you have set up your profile and you are ready to get your transcript.

20. Press **CONTINUE**…

Step #3 – Request your Tax Transcript…

The last step is actually requesting the transcript.

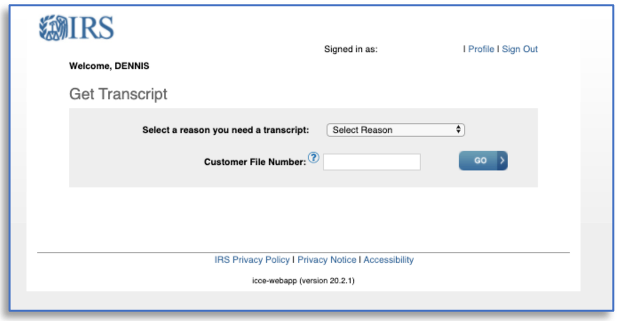
1. Select "**Get Transcript**"
2. You will be asked the reason you need the Transcript.
   - Select **Higher Education / Student Aid** and press **GO**
   - Customer File Number is not required.
3. On the next page you will select the **type of transcript** you need:
   a. Select **Return Transcript**
   b. Select the Most Recent Tax **Year**
   c. Click on the **Year**
4. Your tax Transcript will open as a PDF document.
   a. You have two options. If you are:

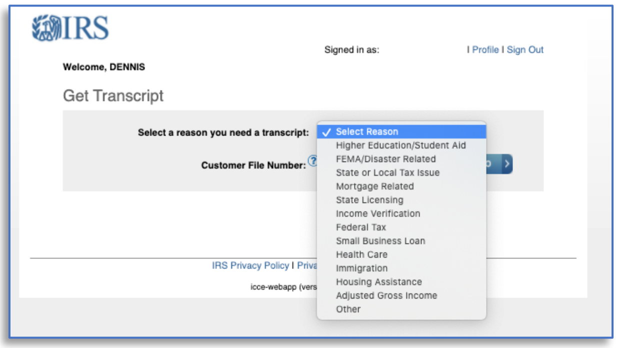
      i. On Your Personal Computer…

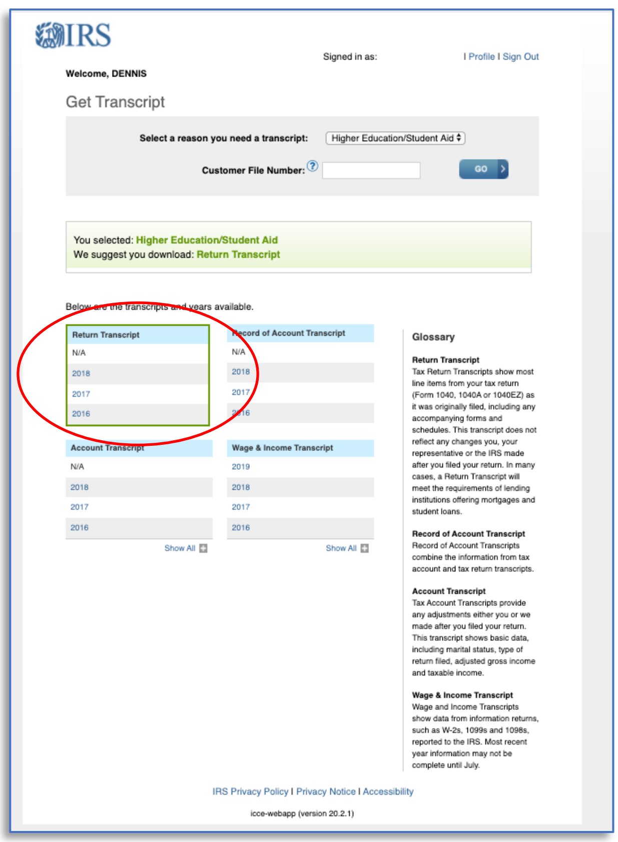
      Save it to your computer, **but only if it's your computer**. In the upper right corner of the screen, select the arrow pointing down to the line. Once it's on your computer, you can print anytime.

      ii. **On a Public Computer/Someone Else's Computer…**

      If it is a public computer or someone else's computer, print the document. At the far upper right of the screen you will see a printer icon. **Do not save it** to a computer that you do not own and control access to.







Frequently Asked FANTIC Questions related to Tax Transcripts…

Your Tax Transcript is a vital component the college uses to determine if you qualify for our Financial Aid program called FANTIC. The FANTIC program has established an Adjusted Gross Income ceiling based on your locality cross-referenced against the number of household members. The Tax Transcript allows us to verify what your household income (Adjusted Gross Income) was and the number of household members (Exemptions).

For technical questions about the IRS website and the process, go to their FAQ webpage:
https://www.irs.gov/individuals/get-transcript-faqs

What if I don't have the documentation and/or a mobile phone to verify my identity to be able to obtain an online Tax Transcript?

To prevent fraud and unauthorized access to your tax information, the IRS must verify you are who you claim to be. They cross reference this other documentation to help them verify your identity. The alternative to obtaining an online tax transcript is to request that they mail your transcript which can take up to two weeks (if they are mailing tax transcripts*). You can either call 800-908-9946 or you can mail or fax in FORM 4506-T (attached to this packet). Instructions are on the back of the form as to where to mail or a fax number.

***IMPORTANT**: Periodically the IRS, during busy periods, suspends mailing transcripts which makes the online access your only option during that time. If you cannot get the online version and the IRS is not mailing tax transcripts, contact our office for additional directions and/or alternatives.

When do I have to submit my Tax Transcript to know if I qualify for FANTIC?

Unless you are receiving Supplemental Nutrition Assistance Program (**SNAP**) or Temporary Assistance for Needy Families (**TANF**), the Tax Transcript is the primary verification of income. It must be submitted with your FANTIC application to determine your eligibility. If you think you may qualify for FANTIC, it important that you request a Tax Transcript prior to applying for FANTIC.

If my transcript shows an Adjusted Gross Income higher than allowed, does that disqualify me from FANTIC?

Initially, yes, but if you have had a life changing event that your income has been dramatically lowered or you no longer have income, you can submit a letter of appeal explaining your situation and along with documentation that substantiates your situation such as a layoff notice or a letter from a former employer explaining the situation. We consider all circumstances. We may ask for additional formation/documentation.

What if I did not file taxes?

That is a complicated situation. If there is a legal and valid reason you did not file taxes, again you can write a letter of appeal substantiating why you did not file and that will be considered. If you didn't file to avoid paying taxes, you must understand that FANTIC and other state/federal tuition aid programs are funded by taxes and if you don't pay, you don't qualify.

What if I have additional questions?

Please contact our office. We have two offices:

Middletown Campus
Corron Community Development Center / Room 103
173 Skirmisher Lane / Middletown, VA 22645
(540) 868-7021

Fauquier Campus
Wolk Hall / Room 209
6480 College Street / Warrenton, VA 20187
(540) 351-1524

The primary LFCC Workforce Solutions contact for FANTIC is **Candace Anderson** and she can be contacted via email at canderson@lfcc.edu. She is located at the Middletown Campus.

Form **4506T-EZ**

(March 2019)

Department of the Treasury
Internal Revenue Service

Short Form Request for Individual Tax Return Transcript

▶ **Request may not be processed if the form is incomplete or illegible.**

▶ **For more information about Form 4506T-EZ, visit *www.irs.gov/form4506tez*.**

OMB No. 1545-2154

Tip. Use Form 4506T-EZ to order a 1040 series tax return transcript free of charge, or you can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on “Get Transcript of Your Tax Records” under “Tools” or call 1-800-908-9946.

1a Name shown on tax return. If a joint return, enter the name shown first.

1b First social security number or individual taxpayer identification number on tax return

2a If a joint return, enter spouse’s name shown on tax return.

2b Second social security number or individual taxpayer identification number if joint tax return

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)

4 Previous address shown on the last return filed if different from line 3 (see instructions)

5a If the transcript is to be mailed to a third party (such as a mortgage company), enter the third party’s name, address, and telephone number. The IRS has no control over what the third party does with the tax information.

Third party name

Telephone number

Address (including apt., room, or suite no.), city, state, and ZIP code

5b Customer file number (if applicable) (see instructions)

Caution. If the tax transcript is being mailed to a third party, ensure that you have filled in line 6 before signing. Sign and date the form once you have filled in this line. Completing this step helps to protect your privacy. Once the IRS discloses your IRS transcript to the third party listed on line 5, the IRS has no control over what the third party does with the information. If you would like to limit the third party's authority to disclose your transcript information, you can specify this limitation in your written agreement with the third party.

6. Year(s) requested. Enter the year(s) of the return transcript you are requesting (for example, “2008”). Most requests will be processed within 10 business days.

__________ __________ __________ __________

Note. *If the IRS is unable to locate a return that matches the taxpayer identity information provided above, or if IRS records indicate that the return has not been filed, the IRS will notify you or the third party that it was unable to locate a return, or that a return was not filed, whichever is applicable.*

Caution. Do not sign this form unless all applicable lines have been completed.

Signature of taxpayer(s). I declare that I am the taxpayer whose name is shown on either line 1a or 2a. If the request applies to a joint return, **either** spouse must sign. **Note:** This form must be received by IRS within 120 days of the signature date.

☐ **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.** See instructions.

Phone number of taxpayer on line 1a or 2a

Sign Here

▶ **Signature** (see instructions) — Date

▶ **Spouse’s signature** — Date

Section references are to the Internal Revenue Code unless otherwise noted.

Future Developments

For the latest information about developments related to Form 4506T-EZ, such as legislation enacted after it was published, go to *www.irs.gov/form4506tez*.

What's New. The transcripts provided by the IRS have been modified to protect taxpayers' privacy. Transcripts only display partial personal information, such as the last four digits of the taxpayer's Social Security Number. Full financial and tax information, such as wages and taxable income, is shown on the transcript.

A new optional Customer File Number field is available to use when requesting a transcript. You have the option of inputting a number, such as a loan number, in this field. You can input up to 10 numeric characters. The customer file number should not contain an SSN. This number will print on the transcript. The customer file number is an optional field and not required.

Caution. Do not sign this form unless all applicable lines have been completed.

Purpose of form. Individuals can use Form 4506T-EZ to request a tax return transcript for the current and the prior three years that includes most lines of the original tax return. The tax return transcript will not show payments, penalty assessments, or adjustments made to the originally filed return. You can also designate (on line 5a) a third party (such as a mortgage company) to receive a transcript. Form 4506T-EZ cannot be used by taxpayers who file Form 1040 based on a tax year beginning in one calendar year and ending in the following year (fiscal tax year). Taxpayers using a fiscal tax year must file Form 4506-T, Request for Transcript of Tax Return, to request a return transcript.

Use Form 4506-T to request tax return transcripts, tax account information, W-2 information, 1099 information, verification of non-filing, and record of account.

Automated transcript request. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on “Get Transcript of Your Tax Records” under “Tools” or call 1-800-908-9946.

Where to file. Mail or fax Form 4506T-EZ to the address below for the state you lived in when the return was filed.

If you are requesting more than one transcript or other product and the chart below shows two different addresses, send your request to the address based on the address of your most recent return.

If you filed an individual return and lived in:	**Mail or fax to the “Internal Revenue Service” at:**
Alabama, Kentucky, Louisiana, Mississippi, Tennessee, Texas, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address	RAIVS Team Stop 6716 AUSC Austin, TX 73301 855-587-9604
Alaska, Arizona, Arkansas, California, Colorado, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	RAIVS Team Stop 37106 Fresno, CA 93888 (855) 800-8105
Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia	RAIVS Team Stop 6705 S-2 Kansas City, MO 64999 855-821-0094

Line 1b. Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) or your individual taxpayer identification number (ITIN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

Line 3. Enter your current address. If you use a P.O. box, include it on this line.

Line 4. Enter the address shown on the last return filed if different from the address entered on line 3.

Note. If the address on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address.

Line 5b. Enter up to 10 numeric characters to create a unique customer file number that will appear on the transcript. The customer file number **should not** contain an SSN. Completion of this line is not required.

Note. If you use an SSN, name or combination of both, we will not input the information and the customer file number will be blank on the transcript.

Signature and date. Form 4506T-EZ must be signed and dated by the taxpayer listed on line 1a or 2a. The IRS must receive Form 4506T-EZ within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines are completed before signing.

You must check the box in the signature area to acknowledge you have the authority to sign and request the information. The form will not be processed and returned to you if the box is unchecked

Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506T-EZ exactly as your name appeared on the original return. If you changed your name, also sign your current name.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. If you request a transcript, sections 6103 and 6109 require you to provide this information, including your SSN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506T-EZ will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form,** 9 min.; **Preparing the form,** 18 min.; and **Copying, assembling, and sending the form to the IRS,** 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506T-EZ simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service
Tax Forms and Publications Division
1111 Constitution Ave. NW, IR-6526
Washington, DC 20224

Do not send the form to this address. Instead, see *Where to file* on this page.