Directions for Obtaining IRS Transcripts for Financial Assistance Applicants

An IRS Return Transcript can be submitted with your completed fee assistance application if you do not have a copy of your 1040 document. The transcript includes most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. There is no fee to request a transcript and no limit on the amount of times it can be requested.

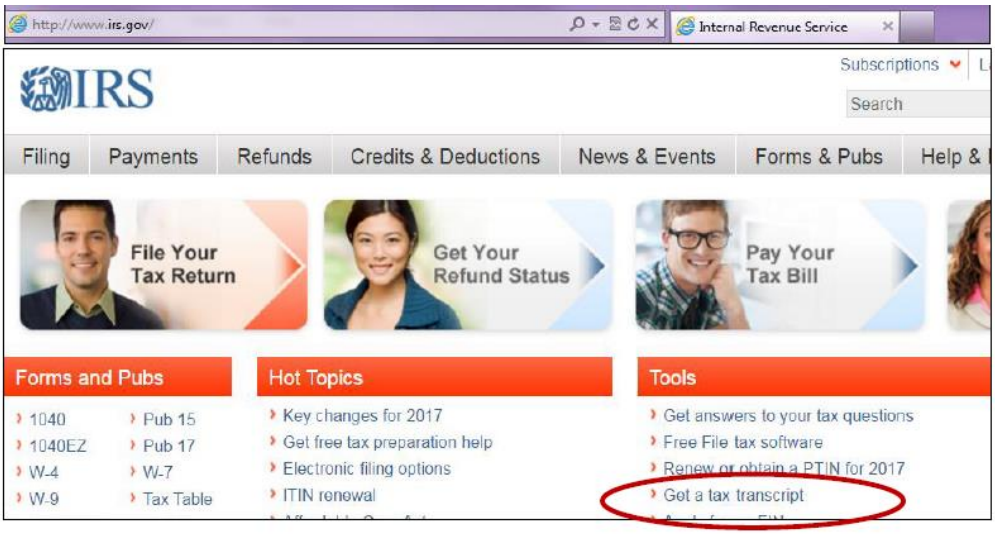
If you did not file taxes in the most recent tax year, you must instead submit the **Verification of Non-Filing** to show that no transcript exists. Applications will not be reviewed by staff without either your most recent 1040 form or one of these two documents.

Both forms can be obtained in several ways:

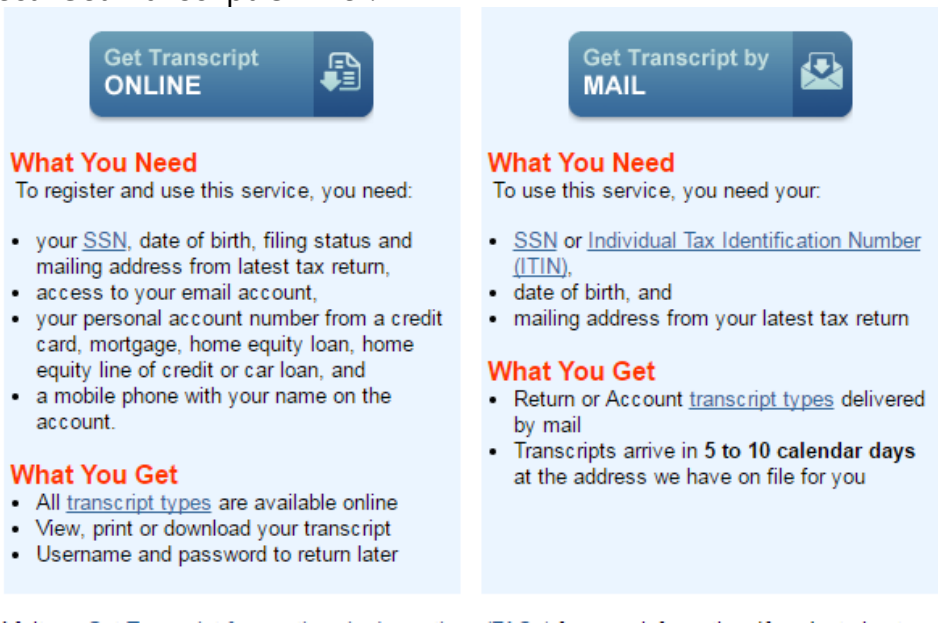
- **Online**: The fastest way to access your transcript. You can create an online account for same-day retrieval, or you can request that the transcript be sent to you via mail. See instructions below.
- **By Phone**: Call the automated retrieval service at 1-800-908-9946 and follow the voice-activated prompts.
- **In Person**: Visit a local IRS office (find a list at http://www.irs.gov/uac/Contact-My-Local-Office-in-north-carolina).
- **By Mail**: Download a "Request for Transcript of Tax Return" (Form 4506-T) from www.irs.gov and send it by mail or fax as directed.

Get Transcript Online

- Visit www.irs.gov. On the home page, under Tools, select "Get a tax transcript".

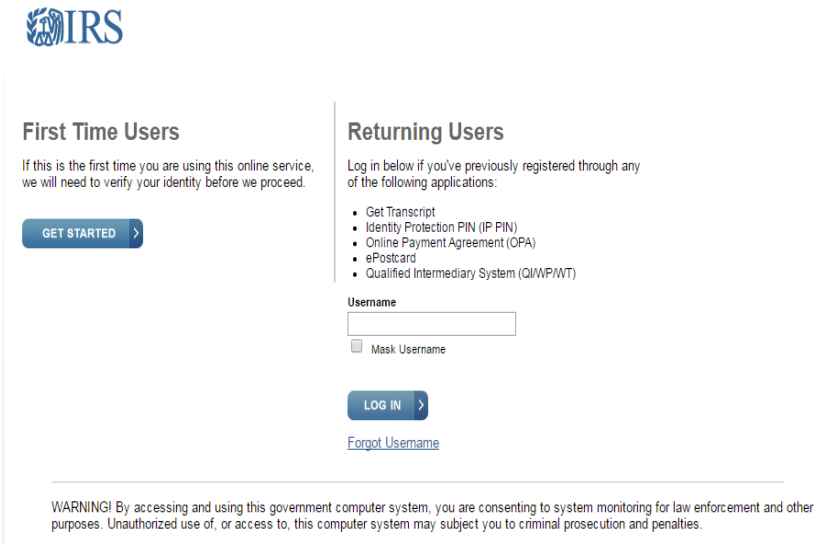


- Select “Get Transcript Online”.

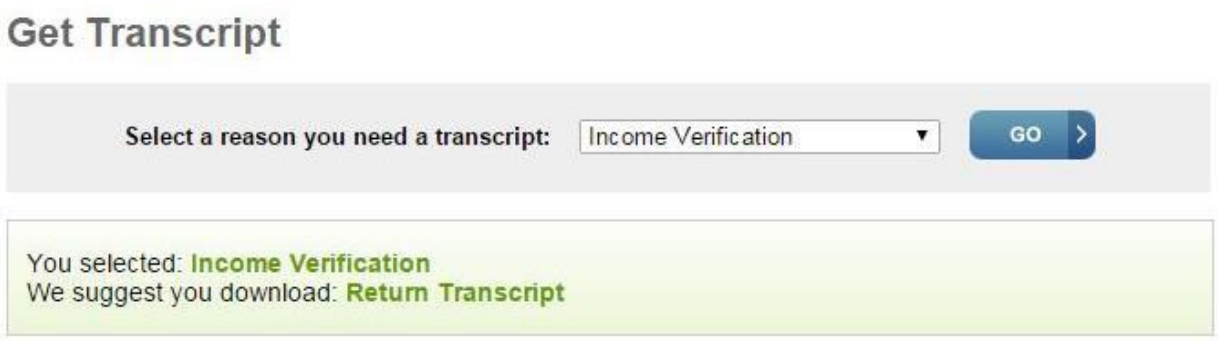


Note: To use Get Transcript Online, you must have your SSN (Social Security Number) and immediate access to your email account to confirm your email address. Then you'll need to answer personal, financial, and tax-related questions to verify your identity.

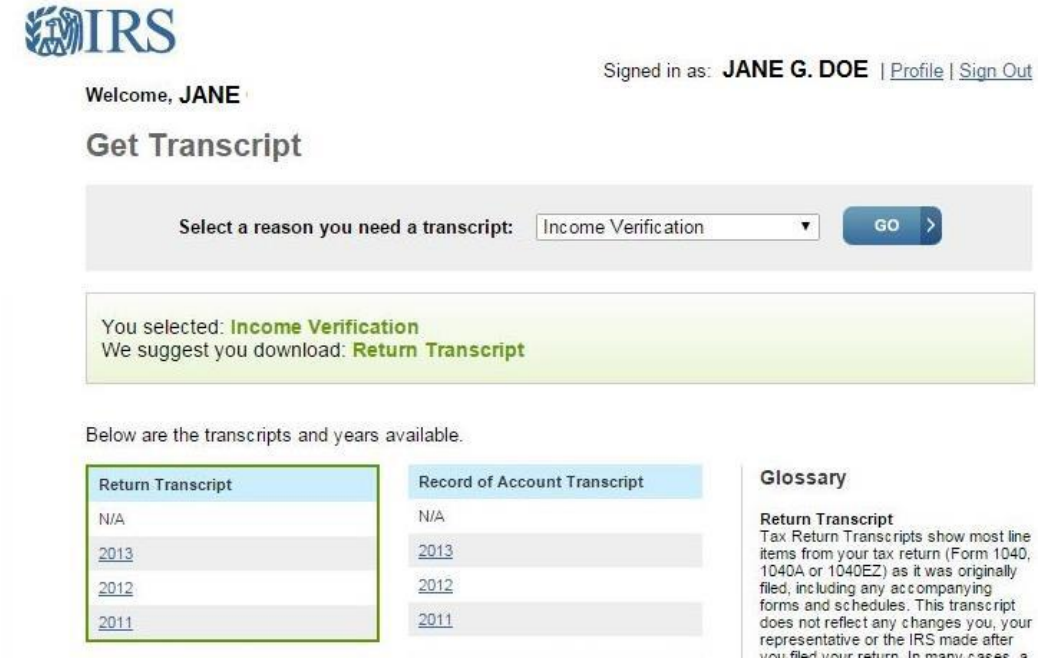
- Create your https://www.irs.gov/ login. You will need to enter your Full Name, email, birthdate, Social Security Number (SSN) or Individual Tax Identification Number (ITIN), tax filing status, current address, a mobile phone number, and a number from ONE of your financial accounts. (It may take a few minutes or hours to receive account confirmation via email.)



- Log into your account. Under “Get Transcript”, select the reason you need a transcript as “Income Verification.”

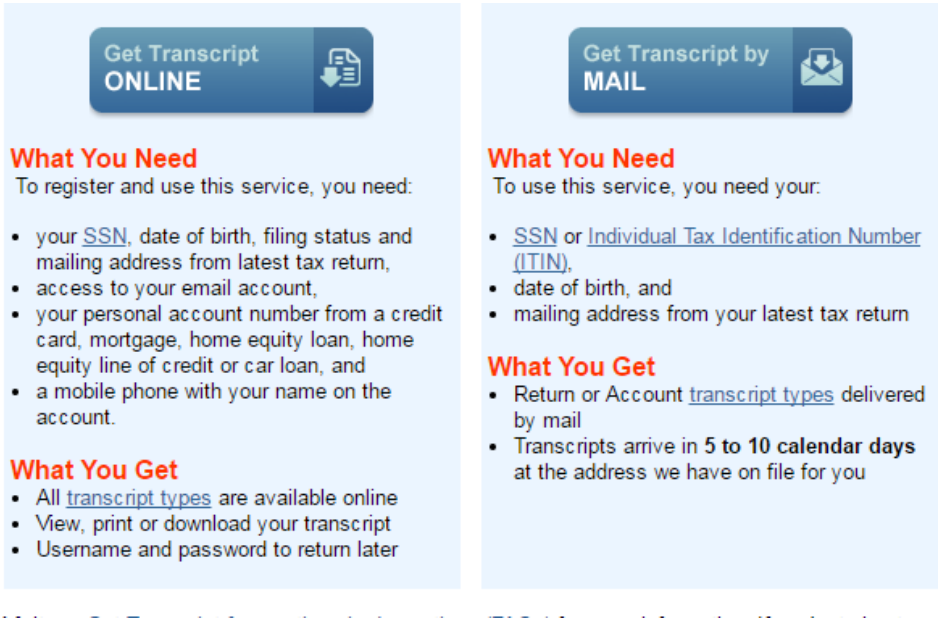


- Under “Return Transcript”, select the most recent year available. The document will open as a PDF which you can download, print, and staple to your application packet. If you did not file taxes for the most recent year, select the “Verification of Non-Filing” option instead.



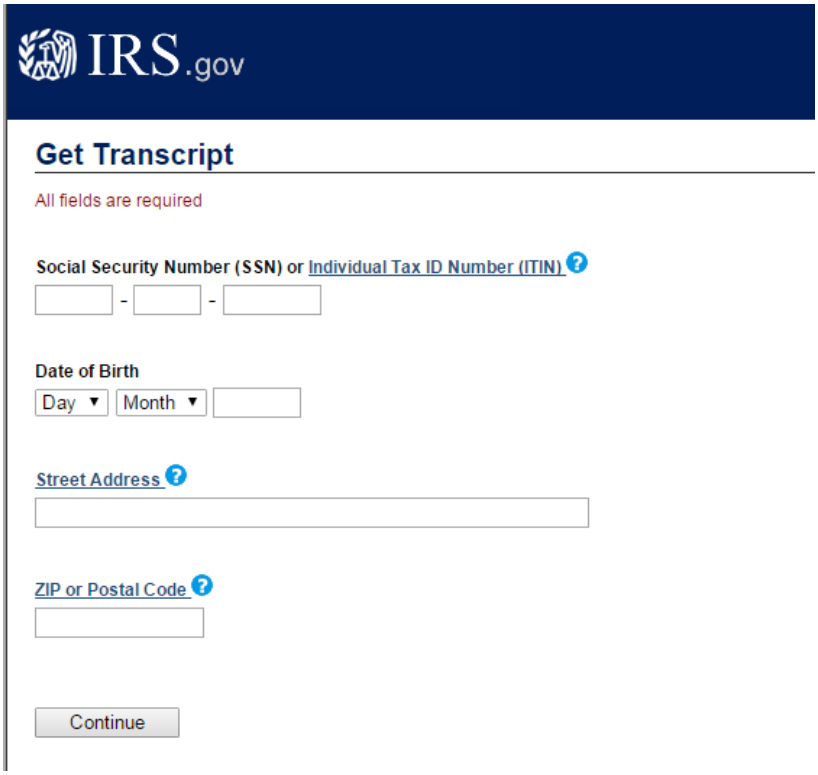
Get Transcript by Mail

- Visit www.irs.gov. On the home page, under Tools, select "Get A Transcript of Your Tax Records".
- Select "Get Transcript by Mail". A Spanish option is available as well (click "en Español").

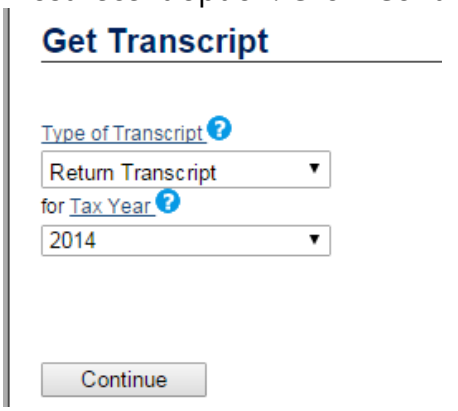


Note: To use Get Transcript by Mail, you will need your SSN or ITIN (Individual Taxpayer Identification Number), date of birth, and address from your latest tax return.

- Enter your SSN or ITIN, date of birth, street address, and zip code. Click "Continue".



- Under “Type of Transcript”, select Return Transcript. Under “Tax Year”, select the most recent option. Click “Continue”.



The final screen will confirm that your request has been received, and you will receive the document in the mail in 5-10 days (after which you can submit it along with the fee assistance application and last two pay stubs).