

# IRS Tax Return Transcript Requirement:

Federal financial aid awards require an IRS tax return **transcript**, not the actual tax form.

The recommended procedure is to link to the IRS by using the **Data Retrieval Tool**.

Applicants may request IRS Tax Return Transcripts using the following methods for free.




IRS Tax Return Transcripts **cannot** be sent directly to NGTC by the IRS. When using these options, the **applicant** obtains printed Tax Return Transcripts and **must provide a copy to an NGTC financial aid advisor**.


## 1. Use the IRS Data Retrieval Tool to Correct Your FAFSA (Recommended)

- Login on [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
- Enter requested student information or FSA ID
- Select Make Corrections to Processed FAFSA.
- Select Financial Information tab.
- Select the appropriate filing status. (If you select **Will File** or **Not Filing**, you will not be eligible to use the IRS Retrieval Tool)
- Select **Link to IRS**.
- The next screen will inform you that you are leaving **FAFSA on the Web**. Select **OK** to continue.
- The [www.irs.gov](http://www.irs.gov) screen appears. Enter the requested information and select **Submit**.
- Once the IRS has validated your identification, your federal income tax information will appear on the screen.
- Check the box beside **Transfer My Tax Information into the FAFSA** and then select **Transfer Now**.  
**Remember to electronically sign and submit the FAFSA again!**

## 2. Online Request:

- Go to [www.irs.gov](http://www.irs.gov) and select **Get a Tax Transcript**.
- Select A blue rectangular button with the text "Get Transcript ONLINE" in white, and a white icon of a document with a downward arrow on the right side.
- To use the online request form you will need the following: (1) your social security number and date of birth, (2) your filing status and mailing address from your latest tax return, (3) an email account, (4) your credit card number or an account number from an auto loan, mortgage, home equity loan or home equity line of credit, and (5) a mobile phone with your name on the account.  
**Save the User ID and Password that you create for future use!**
- After you have authenticated your information and logged in, Select **Higher Education/ Student Aid option**
- Select the year **2017** under the *Return Transcript Box*.
- The Tax Return Transcript will be displayed as a PDF file.

## 3. Transcript by Mail:

- Go to [www.irs.gov](http://www.irs.gov) and select **Get a Tax Transcript**.
- Select A blue rectangular button with the text "Get Transcript by MAIL" in white, and a white icon of an envelope on the right side.
- Enter the required personal information and select **Continue**
- For *Type of Transcript*, select **Return Transcript** and for *Tax Year*, select **2017**
- **For Customer File Number, enter student's NGTC ID number.**
- Select **Continue**
- Read the message and follow any instructions on the screen

## 4. Telephone Request:

- Call the IRS at 1-800-908-9946.
- Tax filers must follow prompts to enter information.
- Select **Option 2** to request an IRS Tax Return Transcript and then enter **2017** for the tax year.
- **For Customer File Number, enter student's NGTC ID number.**

Revised 06/12/2019

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6-14-16