

## Free 2021 IRS Tax Return Transcript Instructions

### **1. By Phone:** Call the IRS at 1-800-908-9946 and listen closely to prompts.

- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2021.**”
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.

### **2. Online:** Available at <http://www.irs.gov>

- In the “**Tools**” Section of the homepage, select “**Get your Tax Records**”. Review your options to receive your transcript online or by mail.
  - “**Get Transcript ONLINE**” The online option will allow you to receive your 2021 transcript immediately but you must have access to an email account and an account in your name from either a credit card, mortgage, home equity loan, home equity line of credit, or a car loan. You must also have a mobile phone with your name on the account. You will also need our SSN, date of birth, filing status and mailing address from latest tax return. **If** you have this information, select to “**Get Transcript ONLINE**” and follow the process through to print your transcript.
  - **OR, “Get Transcript by MAIL”.** Enter the tax filer’s Social Security Number, date of birth, street address, and zip code exactly as they appear on the tax return. Use the address currently on file with the IRS. Generally, this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file. Select “Continue” and in the **Type of Transcript** field, select “**Return Transcript**” and in the **Tax Year** field, select “**2021.**” Unacceptable tax forms include an IRS “Tax Account Transcript” and “Tax Summary.” If successfully validated, the tax return transcript will be mailed to the address noted on your 2021 tax return.

### **3. By Mail:** (address provided on form for your home state)

- Use option #3 **ONLY** if your address has changed from the address listed on your filed tax return.
- **IRS Form 4506T-EZ** should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript. Download at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Complete **Lines 1 – 4**, following the instructions on page 2 of the form. Note that **Line 3** should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on **Line 4**. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- **Line 5** provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. **Be Advised:** the school may not be able to match the tax return transcript to a student if the surname is different between the tax form and the NMJC Student.
- On **line 6**, enter “**2021**” to receive IRS tax information for the 2021 tax year that is required for the 2022-2023 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return. Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ. Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request.
- **NOTE:** Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

### **New Mexico Junior College Office of Financial Aid**

1 Thunderbird Circle | Hobbs, NM 88240

**Toll Free** 1-800-657-6260 | 575-392-5172 | **Fax** 575-492-2559

<http://www.nmjc.edu/student-services/financialaid.aspx>

*For further questions or difficulties receiving your IRS Transcript, please call the IRS at 1-800-829-0922 (Option 1)*