

JOHN A. LOGAN COLLEGE Financial Aid Office 700 Logan College Drive Carterville, IL 62918

2023-2024 INSTRUCTIONS FOR FEDERAL TAX TRANSCRIPT

Getting Your 2021 Federal Tax Transcript Information for the 2023–24 FAFSA

If you're filing a 2023-24 Free Application for Federal Student Aid (FAFSA) form, you must use federal tax information from your 2021 tax return. You can do this by using the IRS Data Retrieval Tool (DRT) or by referring to a copy of your 2021 federal tax return. Always retain a copy of your tax return, either electronically or on paper, and keep it in a secure place.

If you need a transcript of your tax return, here are some options:

- <u>Get Transcript by Mail</u> Go to <u>www.irs.gov</u>. click "Get Your Tax Record." Click "Get Transcript by Mail." Fill in your information, then click *"continue"*. Make sure to request the "Return Transcript" and *NOT* the "Account Transcript." Select the year of the transcript you are requesting then click "continue". The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- 2. You may use the Get Transcript Online tool. To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- 3. <u>Automated Telephone Request</u> 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- 4. <u>Paper Request Form</u> Complete and submit the IRS Form 4506-T. The Transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If you need a copy of the complete tax return you submitted, here are some options:

- 1. Access the tax software product used to prepare and file your 2021 return to download/print a copy.
- 2. Contact the tax preparer who filed your 2021 return.
- 3. Submit <u>Form 4506-T</u>, Request for Transcript of Tax Return by mail or fax. Refer to the form for processing <u>timeframes</u>.

If you need assistance with obtaining your Federal Tax Transcript, call the Financial Aid Office at 618-985-2828, ext. 8308 or stop by the Financial Aid Office located at C210. The Financial Aid Office can help you complete any forms or fax the 4506-T to request your Federal Tax Transcript.