

## **INSTRUCTIONS FOR REQUESTING A WAGE AND INCOME TRANSCRIPT**

**Option 1: Online:** if student/parent/spouse has their own credit card account, auto loan, mortgage, home equity loan or line of credit, we recommend using the much faster “Get Transcript Online” option at [www.irs.gov/transcript](http://www.irs.gov/transcript)

**Option 2: Mailing IRS Form 4506-T:**

- ✓ Go to <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- ✓ On line, **5b enter the student’s UMT student ID number to create a unique Customer File Number that will appear on the transcript.** The customer file number should not contain a SSN
- ✓ Check **box 8 for Wage and Income Transcript**
- ✓ On line 9 enter **December 31<sup>st</sup>** for tax year requested (12/31/XX)
- ✓ Check the box above the signature line. **Note:** 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.
- ✓ Sign and date the form
- ✓ Mail the form using instructions on page 2 (depending on where you lived when you filed)

**Option 3: By Phone:** Dial 1-800-908-9946

- ✓ Choose language preference
- ✓ Enter Social Security Number
- ✓ Verify Address
- ✓ Select option #3 for “other tax information”
- ✓ Select option #1 for “personal and individual tax questions”
- ✓ You will then be connected with an IRS employee to request a Wage and Income Transcript
- ✓ You will then be transferred to the appropriate department to process your request.  
**Note:** *you can request your Wage and Income Transcript be faxed directly to you or mailed within 5-10 days.*

**After receiving your Wage and Income Transcript from the IRS:**

Make sure that the document sent by the IRS includes the non-filer’s partial name and partial social security number (SSN).

Keep a copy of the document for your records.

Write the student’s name and UM ID # on the front page of the document.

Submit a copy to the UM Financial Aid Office.