

How to Request a Tax Return Transcript, 2024-2025

If 2022 income tax return information for the student, parent, or spouse (if applicable) was not available or could not be used, you should provide the institution with a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and schedules 1, 2, and/or 3.**

A **2022 IRS Tax Return Transcript** may be obtained free of charge in one of three ways:

1. Online
2. Telephone
3. Mail

1. Get Transcript Online

Available at on the IRS website - <https://www.irs.gov/>

- Click "**Get Your Tax Record**"
- Click "**Get Transcript Online**" (If at any point, you cannot validate your identity or you lack access to a mobile phone – you may use, Get Transcript by Mail, see below)

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).
- Follow instructions for creating an account or log in.
 - Select "**Tax Return Transcript**" (not "Tax Account Transcript") and in the Tax Year field, select "**2022**".
 - The transcript is displayed online upon successful completion of the IRS's two-step authentication.
 - Submit the Tax Return Transcript to the MSU Financial Aid Office; include student's name & MSU student ID# on the transcript.

2. Automated Telephone Request

Available from the IRS by calling **1-800-908-9946**

- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally, these will be numbers of the street address that was listed on the latest tax return filed.
- Select "**Option 2**" to request an IRS Tax Return Transcript (not "Tax Account Transcript") and then enter "**2022**".
- For the "Customer File Number," enter your seven-digit MSU Student ID number.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address provided in their telephone request within 10 business days from the time of the request.
- Submit the Tax Return Transcript to the MSU Financial Aid Office; include student's name & MSU Student ID# on the transcript.

3. Get Transcript by Mail

Available at on the IRS website - <https://www.irs.gov/>

- Click on "**Get Your Tax Record**"
- Click "**Get Transcript by Mail**"
- Request "**Return Transcript**" (not "Account Transcript") and in the Tax Year field, select "**2022**".
- Customer File Number – enter the student's (seven-digit) MSU Student ID number.
- Tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request within 10 business days.
- Submit the Tax Return Transcript to the MSU Financial Aid Office; include student's name & MSU Student ID# on the transcript.

HOW TO SUBMIT YOUR TAX RETURN TRANSCRIPT TO MINOT STATE:

- **SUBMIT ONLINE** using our SECURE FILEDROP by visiting: <https://www.MinotStateU.edu/finaid/verification.shtml>
- **IN PERSON** - Minot State University, Administration Building, 2nd Floor, Minot State Financial Aid Office
- **SECURE FAX** (701) 858-4310
- **MAIL**
Minot State University
Attn: Financial Aid Office
500 University W
Minot, ND 58707

Tax Filers with Special Circumstances

Individuals Granted a Filing Extension by the IRS beyond the automatic six-month extension for the tax year 2022, must provide the following:

- A signed statement listing the sources of any 2022 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022;
- A copy of IRS Form W-2 for **each** source of employment income received or an equivalent document for tax year 2022; and
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the tax year 2022.

Individuals Who Filed an Amended IRS Income Tax Return for the tax year 2022 - Must provide a signed copy of the 2022 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS in addition to one of the following:

- Updated income and tax information from the IRS on and ISIR record with all tax information from the original tax return;
- A **2022 IRS Tax Return Transcript** (that will only include information from the original tax return and does not need to be signed), or any other IRS tax transcript(s) that includes all the income and tax information required to be verified; or
- A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft – Must provide:

- a Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with the IRS; **and**
- a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax related identity theft and that the IRS is aware of the tax-related identity theft. For more information, contact the IRS at 1-800-908-4490.

Individuals Who Filed Non-IRS Income Tax Returns –

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.