

IRS Tax Return Transcript Request

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to www.FAFSA.ed.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer your 2015 Federal income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

If you are unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, you must submit a **2015 IRS tax return transcript**—not a photocopy of the income tax return.

Tax filers can request a transcript, free of charge, of their 2015 tax return from the IRS in one of four ways.

Go to <http://www.irs.gov/Individuals/Get-Transcript> Choose either:

Online Request:

Get Transcript Online

- This is the fastest way to get a transcript. You are able to view and print your transcript immediately after authenticating your identity. Select Create an Account and enter the requested information. A confirmation code will be sent to your email account. You need to enter that code to verify the email. Continue through the Sign Up process answering the questions. You will need to answer some personal questions in order to authenticate your request.
- You will need to 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.
- Once an account is successfully created, select "Higher Education/Student Aid" as the reason for requesting a transcript.
- Select "Return Transcript" for "2015" for the 2016-2017 FAFSA
- Your requested transcript will open in a new window. You should print a pdf copy to submit to the Financial Aid Department, and print or make an additional copy for your own records. -OR-

Get Transcript by Mail

- Enter requested information.
- Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. 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.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

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 this will be numbers of the street 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 "**Option 2**" to request an IRS Tax Return Transcript and then enter "**2015**".
- 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.

- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

Paper Request Form – IRS Form 4506T-EZ

- 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 <http://www.irs.gov/pub/irs-pdf/f4506tez.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.

Institutions are responsible for notifying aid applicants whether to list the institution as the third party to receive the Transcript or not. Some institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different.

- On line 6, enter "2014" to receive IRS tax information for the 2014 tax year that is required for the 2015-2016 FAFSA. Enter "2013" to receive IRS tax information for the 2013 tax year that is required for the 2014-2015 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.

Form W-2, Wage and Tax Statement

If you are required to submit copies of W-2s and other records received for earnings you may submit copies of the original documents to the Financial Aid Office. If, for some reason, you are unable to provide copies of the original documents please use one of the options below:

- Obtain a copy of a prior year Form W-2 through your employer.
- Print a computer transcript of your Form W-2 information, as well as other transcripts, for free, by using the Get Transcript tool on the IRS website and request a "Wage & Income Transcript." You must have a Social Security Number (SSN) and other personal information to verify your identity and use the system.
- Call the IRS at 1-800-829-1040 and request a **Wage and Income Transcript**
- If you are unable to receive your Form W-2 transcript using the online tool, mail or fax Form 4506-T, Request for Transcript of Tax Return. Expect to receive your wage & income transcript within 5 to 10 days from the time we receive your request.
- If that is not possible, you can order copies of your entire return (attachments include Form W-2) from the IRS for a fee. To receive a copy of your return, complete and mail Form 4506, Request for Copy of Tax Return, along with the required fee. Allow 75 calendar days for us to process your request.

**Wage & income transcripts are available for the past ten tax years but information for the current tax year may not be complete until July. Please note that a wage & income transcript only includes federal information; it does not include state or local information.*