

How to Provide Finalized Federal Income Tax Information

Please Note: Due to the outage of the IRS Data Retrieval Tool (DRT) the Department of Education now allows a signed copy of the 2015 IRS tax return that was used by the tax filer for submission to the IRS to be accepted in lieu of a tax return transcript. Additional documents may still be needed if one or more of the circumstances on the following page are true.

If you choose to submit an IRS Tax Return Transcript, below are the options to request your transcript from the IRS. Finalized tax information is available after your tax return has been received and processed by the IRS. **If you file electronically**, your information will be available about 3 weeks after filing. **If you file by mail**, your information will be available about 6 weeks after filing.

IRS Tax Return Transcript Request Process

Tax filers can request a transcript, free of charge, of their tax return from the IRS in one of three ways - online, by phone, or by mail. IRS Tax Return Transcripts requested online or by telephone cannot be mailed to an address other than the address on file with the IRS. Complete for both parent and student, as applicable.

Online Request at www.irs.gov.

- In the **Tools** section of the homepage click “Get a Tax Transcript”.
- Enter the primary tax filer’s Social Security number (SSN) or Individual Tax Identification Number (ITIN), date of birth, and address from your latest tax return.
- In the **Type of Transcript** field, select “Return Transcript” and in the **Tax Year** field, select the year you wish to request (i.e., for the 2017-2018 FAFSA, the 2015 tax year is required).
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request in 5-10 days.
- Once you receive the Tax Return Transcript from the IRS, please include your student’s full name and student ID before sending it to our office. It can be sent to our office via fax, email, or mail. If you are mailing it to our office, please keep a copy of the Tax Return Transcript for your records as the IRS will only provide one transcript free of charge per year.

Telephone Request at 1-800-908-9946

- Follow prompts to enter the primary tax filer’s social security number and the numbers in their street address. Use the address from your latest tax return.
- Select “**Option 2**” to receive a transcript of your tax return. Enter the year you would like to request (i.e., for the 2017-2018 FAFSA, the 2015 tax year is required).
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their telephone request in 5 -10 days.
- Once you receive the Tax Return Transcript from the IRS, please include your student’s full name and student ID before sending it to our office. It can be sent to our office via fax, email, or mail. If you are mailing it to our office, please keep a copy of the Tax Return Transcript for your records as the IRS will only provide one transcript free of charge per year.

Paper Request Form – IRS Form 4506T-EZ

- Form can be downloaded at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf> .
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- **Do not complete Line 5. Tax Return Transcripts must be sent to the parents or student.**
- On line 6, enter the year you are requesting (i.e., for the 2017-2018 FAFSA, the 2015 tax year is required).
- The tax filers must sign and date the form and enter their telephone number. Sign the Form 4506T-EZ exactly as your name appeared on your original return.
- Mail or fax the completed form to the appropriate address or fax number provided on page 2.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request 5-10 days from the time the IRS receives and processes their signed request.
- Once you receive the Tax Return Transcript from the IRS, please include your student’s full name and student ID before sending it to our office. It can be sent to our office via fax, email, or mail. If you are mailing it to our office, please keep a copy of the Tax Return Transcript for your records as the IRS will only provide one transcript free of charge per year.

Additional Documentation

If one of the below is applicable, additional documents will be needed to complete verification.

If you:	In this case, you should submit the following:
Filed an amended 2015 Federal Tax Return.	-An IRS Tax Return Transcript or a signed copy of your original submitted tax return -A signed copy of the filed 1040X
Filed 'Married Filing Separately'.	-An IRS Tax Return Transcript for each parent or a signed copy of both parents' submitted tax return
Filed 'Married Filing Joint' and are no longer married to whom you filed.	-An IRS Tax Return Transcript or a signed copy of your submitted tax return (the custodial parent must document which amounts apply only to he or she) -A copy of W-2s for each source of employment income received
Will not file a 2015 Federal Tax Return.	-A Non-Filer Statement, attaching any W-2s received for employment income reported on the FAFSA.
Filed a non U.S. Tax Return (including U.S. territories of Guam, American Samoa, and the U.S. Virgin Islands), commonwealths (Puerto Rico and Northern Mariana Islands) and all other foreign tax returns.	- A copy of a transcript of tax information, if a transcript is available at no charge from that jurisdiction's taxing authority. A signed copy of the applicable 2015 income tax return that was filed with the taxing authority is only acceptable if you are unable to obtain a free copy of a transcript of tax information.