

Tax Retrieval Instructions

Students chosen for verification are required to provide certain tax information. The two main options for doing this are either to use the Data Retrieval Tool on the student's FAFSA to pull the tax information in electronically **OR** to request a copy of the 2015 Tax Return Transcript from the IRS (2015 W2(s) must also be supplied with this option). Please see your verification form to determine what documentation is required.

TO USE THE IRS DATA RETRIEVAL TOOL:

- Log into the student's FAFSA and click the link to "make a FAFSA correction."
- Under the "Financial Information" tab, if you have indicated you have already completed your taxes and are able to answer no to the yes/no questions which follow, you will be presented with a blue "Link to IRS" button.
- Click the "Link to IRS" button and follow the instructions on the IRS website to transfer the information to the FAFSA.
- Ensure you sign and submit the FAFSA to send the updated information to our school.
- NOTE: if any changes are made to the information transferred using the IRS data retrieval tool, you will be required to submit a tax return transcript and W2(s) to our office.

TO REQUEST A TAX RETURN TRANSCRIPT:

When requesting a transcript, tax filers need to provide their Social Security Number (SSN), date of birth, street address, and ZIP Code as is currently on file with the IRS. Generally, this is the address included on the latest tax return filed with the IRS. However, if an address change was made either with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file. If this is the case use the updated address.

Joint Tax Return - When requesting a transcript using the electronic processes described below, use the primary tax filer's information (e.g., SSN). When requesting a transcript using one of the paper processes described below, either spouse may submit the request and only one signature is required.

Online Request - Get Transcript by MAIL

- Available on the IRS Web site at www.irs.gov.
- Under the Tools heading on the IRS homepage click "Get Transcript of Your Tax Records."
- Click "Get Transcript by MAIL."
- Acknowledge the disclosure pop up box that appears by clicking "OK."
- Complete the required fields (SSN, DOB etc.) then click "Continue."
- In the Type of Transcript field, select "Return Transcript" and, in the Tax Year field, select "2015."
- Click "Continue."
- 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 business days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be mailed to an address other than the address on file with the IRS.

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Telephone Request

- Available from the IRS by calling 1-800-908-9946.
- To continue in English press 1.
- Tax filers must follow prompts to enter their Social Security number and the numbers in their street address.
- 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 included in their telephone request within 5 to 10 business days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be mailed to an address other than the address on file with the IRS.

Paper Request Form – IRS Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript

- Download a PDF for the 4506T-EZ at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>.
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- 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 IRS Tax Return Transcript from the IRS. Third parties should provide specific address information including a room #, ATTN lines, names, etc. so that the transcript is delivered to the appropriate person/office. The IRS will send the transcript only to the address listed on Line 5. The IRS will not mail a copy of the transcript to the tax filer, nor will the tax filer receive notification that the transcript was sent to the designated third party.
- On line 6, enter “2015” to receive tax information for the 2015 tax year that is required for 2016- 2017 FAFSA® verification.
- The tax filer must sign and date the form and enter their telephone number. Sign the IRS Form 4506T-EZ exactly as your name appeared on the original tax return. If you changed your name prior to submitting your tax return, also sign your current name.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of IRS Form 4506T-EZ.
- Tax filers can expect to receive their IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes their signed request. However, if a third party is identified on line 5, the third party can expect to receive the tax filer’s IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes the signed request.
- NOTE: If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

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Paper Request Form – IRS Form 4506-T, Request for Transcript of Tax Return

- Download a PDF for the 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript or IRS Record of Account 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 IRS Tax Return Transcript or IRS Record of Account from the IRS. Third parties should provide specific address information including a room #, ATTN lines, names, etc. so that the transcript is delivered to the appropriate person/office. The IRS will send the transcript only to the address listed on Line 5. The IRS will not mail a copy of the transcript to the tax filer, nor will the tax filer receive notification that the transcript was sent to the designated third party.
- On line 6, enter the tax form number that is being requested (1040, 1040A, 1040EZ, etc.) and then check the appropriate box for the transcript being requested. Only one tax form number can be used per request.
- On line 9, enter “12/31/2015” to receive IRS tax information for the 2015 tax year that is required for 2016-2017 FAFSA® verification.
- The tax filer must sign and date the form and enter their telephone number. Sign the IRS Form 4506-T exactly as your name appeared on the original tax return. If you changed your name after submitting your tax return, also sign your current name.
- Mail or fax the completed IRS Form 4506-T to the appropriate address (or FAX number) provided on page 2 of IRS Form 4506-T.
- Tax filers can expect to receive their IRS Tax Return Transcript or IRS Record of Account within 10 business days from the time the IRS receives and processes the completed and signed 4506- T request. However, if a third party is identified on line 5, the third party can expect to receive the tax filer’s IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes the signed request.
- NOTE: If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.