

### Option #1 IRS Data Retrieval Tool (Preferred)

**Per Federal regulations: Students and parents can no longer submit a signed copy of their IRS 1040 as a way to confirm the income reported on the FAFSA.** When completing income sections on the FAFSA, the applicant is given the option to have tax data retrieved directly from the IRS through the IRS Data Retrieval Tool. This *may* eliminate the request for a Tax Return Transcript if the transfer is successful.

- ✓ Click on the “Financial Information” tab. Select “Already Completed” for the tax return filing status and answer the eligibility questions.
- ✓ If you are eligible to use the IRS Data Retrieval Tool, click on the LINK TO IRS button.
- ✓ Click “OK” to accept the IRS Data Retrieval Tool terms of use.
- ✓ Enter the requested information and click “Submit”. Remember to enter the address **exactly** as it appeared when you filed your taxes.
- ✓ Review the information that the IRS has retrieved from your tax return. Click the box “Transfer My Tax Information into the FAFSA” and click “Transfer Now”. Your IRS Data will be transferred into your FAFSA and you will be returned to the FAFSA website.
- ✓ **Do not** update any answers that show “Transferred from the IRS” or your school may require you to supply additional documentation.

**NOTE:** If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financial Information Section and once under the Parent Financial Information section.

### Option #2 Print Online (Request)

- ✓ Go to the IRS Web site at [irs.gov/Individuals/Get-Transcript](https://irs.gov/Individuals/Get-Transcript) ✓ Click “Get Transcript ONLINE”  
Warning pops up that this site is for authorized use only, click ok
- ✓ Click on Create an Account, enter the requested information.
- ✓ Click “Continue”. If you Select the checkbox and click the "Continue" button you will proceed as a guest. *Proceeding as a guest user will require you to enter this information every time you access the system.* If you would like this information stored for future use do not check the box. Click the "Continue" button to create a User ID and password. Site will ask questions to determine your identity (ex. age, assets, debts).
- ✓ Create a Site Phrase and Site Image and select and answer security questions. ✓ Create a User ID and Password
- ✓ Click submit; you should get a message that indicates User Profile Successfully Created ✓ Click Continue
- ✓ Create a Site Phrase and Site Image and select and answer security questions.
- ✓ Select Higher Education/Student Aid as the reason you are requesting your Tax Return Transcript
- ✓ Click on the appropriate Tax Year in the Return Transcript that you are requesting *If you have a pop up blocker you will need to turn it off so Transcript can be printed.*
- ✓ Your Tax Return Transcript will be displayed, print tax documents.
- ✓ Once you have printed the documents, click on “Sign Out”
- ✓ Submit documents to the Financial Aid Office with copies of all W2s from all jobs held in requested tax year. (ie: 2021-2022 FAFSA requires 2019 tax year documents)

### Option #3 In Person Request

- ✓ Call 1-844-545-5640 to set up an appointment at your local IRS Office to obtain a copy, free of charge.

## **Option #4: 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 is listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- ✓ Select “Option 2” to request an IRS Tax Return Transcript and then enter appropriate tax year.
- ✓ If successfully validated tax filers can expect to receive a paper IRS Tax Return Transcript. It will be delivered to the address that was used in their telephone request. It should arrive within 5 to 10 business days from the time the IRS receives the request.

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

## **Option #5: 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 [irs.gov/pub/irs-pdf/f4506tez.pdf](https://irs.gov/pub/irs-pdf/f4506tez.pdf).
- ✓ Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. ***However, you should not select this option;*** have the IRS Tax Return Transcript mailed directly to you.
- ✓ On line 6, enter appropriate tax year to receive IRS tax information.
- ✓ Tax filers can expect to receive their transcript within 5 to 10 business days from the time the IRS receives and processes the 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.

## **Requesting Form W2, Wage and Tax Statement**

If you are required to submit copies of W2s and other records received for earnings you may submit copies of the originals. 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 the appropriate requested year W2 through your employer.
- ✓ Print a computer transcript of your W2 by using the Get Transcript tool on the IRS website. Request a “Wage & Income Transcript”. You must have a Social Security Number (SSN) and other personal information to verify your identity and use the IRS system.
- ✓ Call the IRS at 1-800-908-9986 and request a Wage & Income Transcript to be sent to you by mail.
- ✓ Call 1-844-545-5640 to set up an appointment at your local IRS Office to obtain a copy, free of charge.
- ✓ If you are unable to receive your W2 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 business days from the time the IRS receives your request.

**Note** - If you have Amended your Tax Return you will need to request and submit a copy of your IRS Tax Return Transcript and a signed copy of your Federal 1040X Tax Return to the Financial Aid Office.