Instructions for Verifying your Tax Information and Obtaining Tax Transcripts 2014-15

If you have been selected for Verification for 2014-15, you may need to submit information to verify your 2013 tax return information. If you have "Tax Transcript" listed as a document that is "Not Received" under the Financial Aid Eligibility section of your FHSU TigerTracks account, you will need to submit this information.

In order to verify your tax information, you need to complete one of the following options:

Option 1: Use the IRS Data Retrieval Tool on FAFSA to import your tax information.

We strongly recommend using Option 1 if you are eligible. It will allow you to complete this step most quickly. If Option 1 is not offered to you, please use Option 2 -4.

1. Log into your FAFSA to make a change and select the Financial Information tab. Below the yes/no questions, you can use the IRS Data Retrieval Tool to import your tax information. Make sure all information on the IRS prompt matches your 1040 that has been filed. Once matched, select to **transfer** the information from the IRS to the FAFSA. After making the transfer, you will need to **resubmit** your FAFSA. Please note that not everyone is eligible to use the IRS Data Retrieval Tool. If you are eligible, this option should be available to you 3 weeks after you electronically filed your tax return or 11 weeks after you filed a paper tax return.
2. It will take 7-10 days for our office to receive this information.

Option 2: Request a Free IRS Tax Transcript Online – by PDF download or through mail

There is no charge for a tax transcript. It contains the important lines needed to apply for or verify financial aid information.

1. Visit www.irs.gov.
    a. In the orange Tools section of the homepage, click "Get Transcript for My Tax Records"
    b. Choose either "online" or "mail"
    c. If "**online**" route is selected, you will create an account by using your email.
        i. Continue by using the confirmation code sent via email. Next is verifying personal information (social security number, date of birth, filing status, mailing address).
        ii. On the "Get Transcript" page, you will select the reason for requesting the transcript as "Higher Education/Student Aid". A green box highlights "Return Transcript" and then select "2013".
        iii. Make sure any pop-up blockers are turned off for this site. Save this document. You may choose to then print or email our office the attachment to *finaidvc@fhsu.edu*.
    d. If "**mail**" route is selected, 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.
        i. Click continue. In the Type of Transcript field, select "Return Transcript" and in the Tax Year field select "2013".
        ii. 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 online request was successfully transmitted to the IRS.
        iii. IRS Tax Return Transcripts requested online CANNOT be sent directly to a third party by the IRS. It will be sent to your address filed with the IRS. Once you receive it, submit it to our office.

Option 3: Request a Free IRS Tax Transcript by Telephone (Automated)

1. Call the Internal Revenue Service (IRS) customer service at 1-800-908-9946 to request tax information via the automated system. Assistance is available between the hours of 7:00AM and 7:00 PM (local time).
    a. Tax filers must follow prompts to enter their Social Security Number and the numbers in their street address. Generally, these will be the numbers of the street address that was listed on the latest tax return filed.
    b. For about 1 minute, there will be an explanation of the transcripts available for request. To receive the transcript for financial aid purposes, enter "2" in order to select option 2 – Tax Return Transcript. Then enter "2013".
2. 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.
3. IRS Tax Return Transcripts requested by telephone CANNOT be sent directly to a third party by the IRS. It will be sent to your address filed with the IRS. Once you receive it, submit it to our office.

Option 4: Request a Free IRS Tax Transcript by Paper Request Form – IRS Form 4506T-EZ

1. IRS Form 4506T–EZ should be used instead of IRS Form 4506–T because it is sufficient to request an IRS Tax Return Transcript.
    a. Download the IRS Form 4506T-EZ at http://www.irs.gov/pub/irs-pdf/f4506tez.pdf.
    b. 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 U.S Postal Service, the IRS may have the updated address on file.
    c. Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.
    d. On line 6, enter "2013" to receive IRS tax information for the 2013 tax year that is required for the 2014-2015 FAFSA.
    e. 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.
    f. Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or Fax number) provided on page 2 of Form 4506T-EZ.
2. 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.

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