

# IRS TRANSCRIPT REQUEST PROCESS

*Tax filers can request from the IRS, free of charge, their Tax Return Transcript, Wage & Income Statement or Verification of Non-filing Letter.*

**Before** you request a Tax Return Transcript from the IRS, you can attempt to use the Data Retrieval Tool in the online FAFSA application ([fafsa.ed.gov](http://fafsa.ed.gov)) in order to make the process quicker and easier (available for the 18-19 FAFSA, but not available for the 17-18 FAFSA).

## IRS Data Retrieval Tool for the 18-19 FAFSA

**(17-18 FAFSA users should proceed to the next page)**

1. Go to [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
2. Login using your **FSA ID or student information**
3. Select the “Continue” or “Make a Correction” button
4. Click on “Financial Information” tab from the top of the page

### **For Parents:**

- Click on "Parent Financial Information" tab
- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool and if eligible, select which parent is providing information on the FAFSA
- Enter the FSA ID for the parent providing the information
- Click "Link to IRS"
- Review the information displayed and select the “Transfer My Information into the FAFSA” option



### **For Students:**

- Click on "Student Financial Information" tab
- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
- If eligible, click "Link to IRS"
- Review the information displayed and select the “Transfer My Information into the FAFSA” option
- Proceed to the Sign and Submit page

**After using the IRS Data Retrieval Tool, please contact the Financial Aid Office at 732-255-0310 so we can update your information.**

**\*See next page for instructions on ordering IRS transcripts for both the 17-18 and 18-19 academic years.**



## Online Request: Get Transcript Online

(Tax Return Transcript, Wage & Income Transcript or Verification of Non-filing Letter)

1. Available at <https://www.irs.gov/individuals/get-transcript>
2. Click on “Get Transcript Online”
3. Follow the prompts and select the type of transcripts that you require
4. If there are any issues during your request, click on <https://www.irs.gov/individuals/get-transcript-faqs> to determine how to proceed
5. Don’t forget to sign out!\*\*

## Online Request: Get Transcript by Mail (Tax Return Transcript Only)

1. Available at <https://www.irs.gov/individuals/get-transcript>
2. Click on “Get Transcript by Mail”
3. Follow the prompts and select the transcript type - Tax Return Transcript
4. If there are any issues during your request, click on <https://www.irs.gov/individuals/get-transcript-faqs> to determine how to proceed
5. Don’t forget to sign out!\*\*



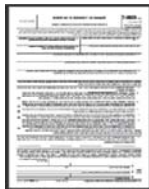
## Telephone Request: Get Transcript by Mail

(Tax Return Transcript only)

1. Available from the IRS by calling 1-800-908-9946
2. If there are any issues during your request, click on <https://www.irs.gov/individuals/get-transcript-faqs> to determine how to proceed\*\*

## Paper Request Form- IRS Form 4506-T

(Tax Return Transcript, Wage & Income Transcript or Verification of Non-filing Letter)



1. Download form at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
2. Complete lines 1-4. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4.\*
3. Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. It is advisable to send directly to the school if it is the student’s transcript only.
4. Line 6 – enter 1040 and check box “a” Return Transcript if a transcript is being requested
5. Check the box in Line 7 and/or 8 if applicable
6. Line 9 – enter the tax year requested: 12/31/2015 for the 17-18 FAFSA, 12/31/2016 for the 18-19 FAFSA
7. 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 4506-T to the appropriate address (or fax number) provided on page 2 of Form 4506-T\*\*

\* However, if an address change has been completed through the US Postal Service, the IRS may have the updated address in file.

\*\*If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their online request, within **5 to 10** days from the time the IRS receives the request.