

Requesting a tax transcript

There are a few ways to request a tax return transcript: online at www.irs.gov, by calling 1-800-908-9946, or by mailing or faxing the paper Form 4506T-EZ, which can be printed out from the IRS website. To order a fiscal year tax transcript for verification, Form 4506-T must be used rather than Form 4506T-EZ. Phone requests are via an automated process instead of an IRS representative. With online requests, tax filers can get an electronic transcript (see below) or they can have the IRS mail them a paper transcript, which is how non-online requests are handled. Only filers who submit a paper 4506-T or 4506T-EZ can choose to have the transcript mailed to a third party. Schools can accept and copy transcripts originally obtained from the IRS.

The Get Transcript Online feature allows users to get the transcript in real time as a portable document format (PDF) file, which they can submit electronically to a school or print and submit as a hard copy. To use the Get Transcript Online tool, users must have (1) access to a valid email address, (2) a text-enabled mobile phone in their name, and (3) specific financial account numbers, such as a credit card number or an account number for a home mortgage or auto loan. The process will not cause charges to the card or the account. See the [July 26, 2016, announcement](#).

Using third parties to get transcripts

The IRS has developed a special Income Verification Express Service (IVES) that allows a third party to receive a tax filer's transcript. The IVES participant submits a 4506-T or 4506T-EZ form, signed by the tax filer, and receives the transcript from the IRS, which charges a small fee for this service. Schools may use a transcript from an IVES participant (which is not considered a third-party servicer in this instance) for verification as long as they have no reason to question its authenticity. Schools may not, however, pass on the charge for using this service to the student. See [GEN-14-05](#) for more information.

or later as a correction. For the retrieved data to be acceptable documentation of tax data, it is necessary that neither students nor parents change the data after it is transferred from the IRS—if the data was changed or if you have reason to believe the data transferred is incorrect, the student will need to provide a return transcript as explained below. The IRS request field(s) on the ISIR will have a value of "02" when the data is unchanged.

If students cannot or will not use IRS Data Retrieval, either at initial FAFSA filing or through the fafsa.gov correction process, they must document AGI, taxes paid, and untaxed income by providing an IRS tax return transcript for the student and spouse or parents, as applicable. Under the following conditions, the IRS DRT is **not** available on fafsa.gov (all apply to both students and parents unless otherwise noted):

- The person did not indicate on the FAFSA that the tax return has been completed.
- The marriage date is January 2017 or later.
- The first three digits of the SSN are 666.
- The person filed a non-U.S. tax return.
- The person is married and filed the tax return either as head of household or married but filing a separate return.
- Neither married parent entered a valid SSN.
- An unmarried parent or both married parents entered all zeroes for the SSN.

Tax transcripts submitted to your school for verification do not need to be signed by the tax filer (but it is encouraged) unless you have reason to doubt their authenticity.

Special situations

■ **Filing extensions.** With the change to prior-prior year tax data, even individuals who have an automatic six-month extension by the IRS should have completed their tax return by the time of verification. Therefore, they must verify income and tax information either by using the IRS Data Retrieval Tool or by submitting to the institution an IRS Tax Return Transcript. Only students and parents granted an extension beyond six months may submit the following for verification:

- a copy of IRS Form 4868, *Application for Automatic Extension of Time to File U.S. Individual Income Tax Return*;
- a copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2016;
- confirmation of non-filing from the IRS dated on or after October 1, 2017;
- copies of all their W-2 forms (or equivalent); and
- if self-employed, a signed statement with the amounts of their AGI and U.S. income taxes paid.