

IRS Tax Documentation Process

You are required to submit your IRS tax information using either the FAFSA "IRS Data Retrieval Tool" or by requesting a "Tax Return Transcript" from the IRS, per federal regulations.

****UPDATE AS OF MARCH 2017**** The IRS Data Retrieval Tool, which allows students and parents to transfer tax information directly to the FAFSA, will be unavailable for an extended period of time. Transcripts are currently the only acceptable form of tax documentation for purposes of verification. Follow instructions below:

How to Request an IRS Tax Return Transcript

Tax filers can request a transcript, free of charge, of their federal tax return transcript from the IRS in one of three ways.

Note: If an **amended tax return was filed** you must submit copies of the tax return transcript and a signed copy of the amended tax return 1040X.

1. Telephone Request

- Available from the IRS by calling 1-800-908-9946.
- Follow prompts to enter your Social Security number and the numbers in your address.
- Select Option 2 to request an IRS Tax Return Transcript and then enter appropriate year.

2. Online Request available at the IRS Website

- Go to <http://www.irs.gov/transcript>
- Choose to **Get Transcript ONLINE** (immediately) or **Get Transcript by MAIL** (5 to 10 days)
- Follow steps on the IRS website to complete the request
- Select **Return Transcript** for the appropriate year

3. Paper Request Form – IRS Form 4506-T-EZ

- Available at www.irs.gov. Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>

Can I visit a Local IRS Office?

If online and telephone requests are not available because of address changes or other errors, you may choose to request an appointment with the IRS in-person by calling 1-844-545-5640 to schedule in Modesto or [looking up your location on the IRS website](#)

Troubleshooting Instructions: Additional Tips for using the IRS Data Retrieval Tool or Ordering a Tax Return Transcript Online

The IRS site uses the U.S. Postal Service address (USPS), which may be different than what appears on your tax return. To identify this U.S. Postal Service address, go to: U.S. Postal Service web address at: <https://www.usps.com/>

1. Click on "Look up a Zip Code" (make certain your browser is set to allow for pop-up windows)
2. Enter your address and Click on Find
3. In the next window, you will see what you typed and what the official USPS address
4. Use the USPS address to retrieve your IRS data
5. Please note that spaces count as characters in the IRS system. Thus, make certain you have the correct spacing in between numbers and words

Enter tax payer's name exactly as it appears on the federal tax return.

ANY punctuation used in your name or address will create an online error. Replace the following with a space: ` , - . #

Some students have found that adding a space and the middle initial to the first name allowed them to proceed with the IRS Data Retrieval Tool. Example: George W

If your current address is different than on the tax return then the DRT or online request options will *not* work for you.

Frequently Asked Questions (FAQ)

I rolled over an IRA and it is showing on the FAFSA as untaxed income. How do I correct this since the IRS Data Retrieval is incorrect?

Submit a copy of your **1099-R** which shows that the money was in fact rolled over.

I filed a joint (married) tax return but now I'm separated. What do I submit?

You must submit:

- Your joint tax return transcript **AND**
- All your W-2 statements and all your spouse's W-2 statements.

The Student Financial Services staff can subsequently adjust the FAFSA to include only the pertinent income. Please note that proof of separate residence may be required (utility bills, signed leases, etc.).

I was single when I filed taxes but I am married now. What do I submit?

You must submit:

- Your tax return transcript and your spouse's tax return transcript, **AND**
- All your W-2 statements and all your spouse's W-2 statements.

I am the victim of identity theft and cannot obtain a copy of my transcript. What should I do?

Victims of identity theft who cannot obtain an IRS Tax Return Transcript will need to submit the following documentation:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS. It can be requested by contacting the IRS's Identity Protection Specialized Unit (IPSU) at 1-800-908-4490; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS identity theft and the IRS has been made aware of the tax-related identity theft.