

# Requesting an IRS Tax Transcript

**What is Verification?** When you submit the FAFSA-on-the-Web, you may be federally selected for a process called “verification.” This means the Department of Education requires the Office of Financial Aid to determine the accuracy of the information you provided through your FAFSA-on-the-Web application. If you are required for verification, you must complete the IRS Data Retrieval Feature on FAFSA-on-the-Web in compliance with Federal guidelines before any Federal aid can be awarded.

**Should You Request an IRS Tax Transcript?** If you or your parent cannot (or choose not to) complete the IRS Data Retrieval, then you may request an IRS transcript (*after you complete your taxes*) and submit it to the Financial Aid Office. You must request an IRS transcript if:

- You (or your parent) did not use the IRS Data Retrieval Process either at initial FAFSA filing or through subsequent corrections.
- You changed information after using the IRS Data retrieval process.
- Your tax status is ‘Married, filing separately’.
- Your parents filed separate tax returns.
- You (or your parent) had a change in marital status after the end of the tax year on December 31.
- You (or your parent) filed an amended tax return.
- You filed taxes outside the U.S.

## How Can You Request an IRS Tax Transcript?

- ✓ On the IRS website ([www.irs.gov/transcript](http://www.irs.gov/transcript)) choose either ‘ONLINE’ or ‘MAIL’ (*See Figure 1-1*)

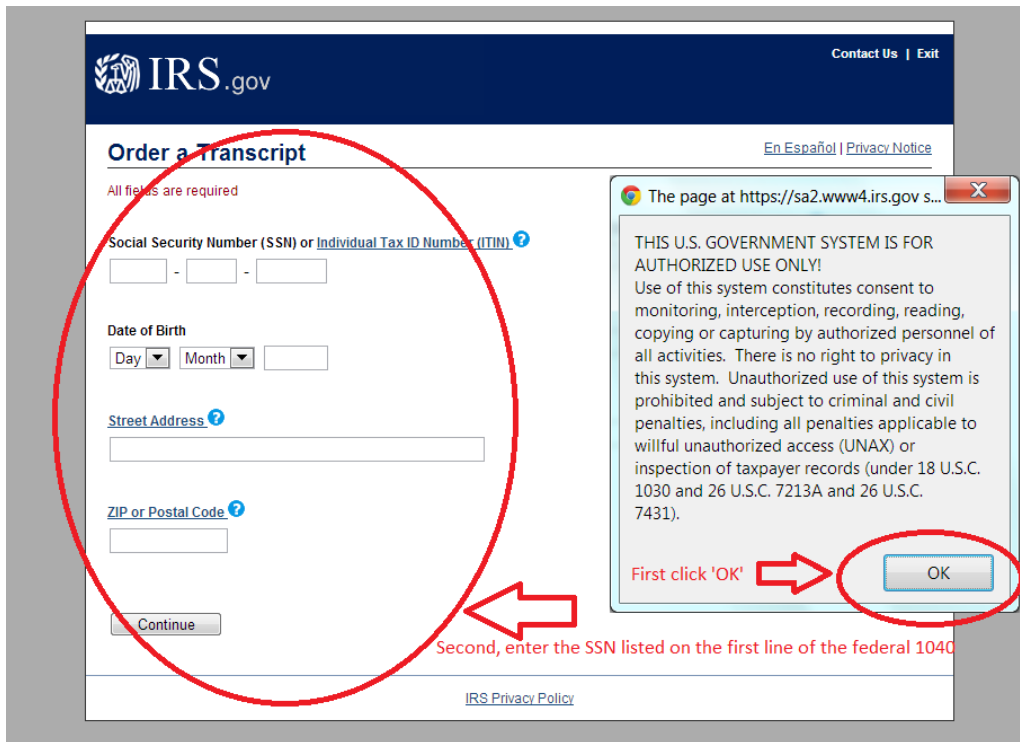
Figure 1-1

The screenshot shows the IRS website's 'Get Transcript' page. The page has a navigation bar with tabs for Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. The main content area is titled 'Get Transcript' and includes a sidebar with categories like Employees, Self-Employed, International Taxpayers, Military, Parents, Seniors & Retirees, and Students. The main text explains that transcripts can be obtained online or by mail, and lists requirements for each method. There are two large buttons: 'Get Transcript ONLINE' and 'Get Transcript by MAIL'. Below these buttons are two columns of bullet points detailing the process and availability for each method. On the right side, there are sections for 'Related Forms' and 'Related Websites'. At the bottom, there is a disclaimer and a page review date of 29-Jan-2015.

\*\*If you choose ‘ONLINE’ you will need to create a login if you haven’t previously done so, and then answer a series of questions that can date as far back as 10 years. If all the questions are answered correctly, you will be able to print the IRS Tax Return Transcript immediately. If you choose ‘MAIL’ you will need to enter the information for the person you need the tax transcript for and it will be mailed to the address on the transcript within 2 to 3 weeks (longer around the April 15<sup>th</sup> tax filing date).

✓ If you choose 'Mail', enter the tax payer information . (See Figure 1-2)

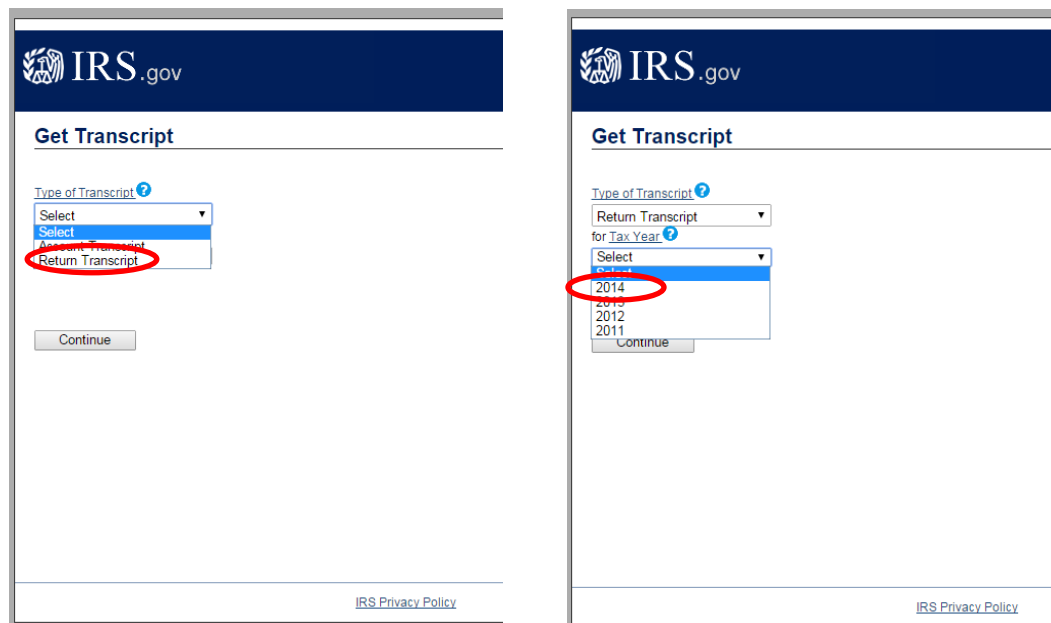
Figure 1-2



✓ After you enter the tax payer information, then select 'Return Transcript' and select the Tax Year '2014' (See Figure 1-3). This option will take a minimum of 2 to 3 weeks.

**NOTE: Be sure to request a "Return Transcript", NOT an "Account Transcript."**

Figure 1-3



\*\* If you have any problems with the website, please call 1-800-908-9946

✓ Or request a return transcript by using the IRS form 4506T (See figure 1-4).

**Form 4506-T**  
 (Rev. January 2012)  
 Department of the Treasury  
 Internal Revenue Service

**Request for Transcript of Tax Return**  
 ▶ Request may be rejected if the form is incomplete or illegible.

OMB No. 1545-1872

**Tip.** Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Order a Transcript" or call 1-800-908-9946. If you need a copy of your return, use **Form 4506, Request for Copy of Tax Return**. There is a fee to get a copy of your return.

<b>1a</b> Name shown on tax return. If a joint return, enter the name shown first.	<b>1b</b> First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
<b>2a</b> If a joint return, enter spouse's name shown on tax return.	<b>2b</b> Second social security number or individual taxpayer identification number if joint tax return
<b>3</b> Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)	
<b>4</b> Previous address shown on the last return filed if different from line 3 (see instructions)	
<b>5</b> If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number.	

**Caution.** If the tax transcript is being mailed to a third party, ensure that you have filled in lines 6 through 9 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy. Once the IRS discloses your IRS transcript to the third party listed on line 5, the IRS has no control over what the third party does with the information. If you would like to limit the third party's authority to disclose your transcript information, you can specify this limitation in your written agreement with the third party.

**6 Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ▶

- a Return Transcript**, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120A, Form 1120H, Form 1120L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days . . . . .
- b Account Transcript**, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 30 calendar days . . . . .
- c Record of Account**, which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days . . . . .
- 7 Verification of Nonfiling**, which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days . . . . .
- 8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS.

Figure 1-4

✓ Once you print or receive your IRS Tax Return Transcript, submit it to the Financial Aid Office for verification. It can be emailed, faxed, or mailed to:

Concordia University, Financial Aid Office  
 1530 Concordia West, Irvine, CA 92612  
 Email: [finaid@cui.edu](mailto:finaid@cui.edu)  
 FAX: (949)214-3500

\*\*Note: Please make sure to list the student's Concordia ID on the top right corner.

Questions: call (949)214-3066