



Southeastern Illinois College
Financial Aid Office
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IRS Tax Return Transcript Request Process

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the web. To use the IRS Data Retrieval tool you must go to www.studentaid.gov and log in to your current FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer IRS income tax information into your FAFSA.

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

Online Request

- Available on the IRS website at www.irs.gov
- In the Online Services section of the homepage, click "Get Transcript of Your Tax Records"
- Click "Get Transcript ONLINE"
- First-time users must click "Create an Account"
- Enter the tax filer's name and email and choose "Send email confirmation code." This may take a few minutes, but do not navigate away from the page
- Enter Confirmation Code and click "Verify Email Confirmation Code"
- Enter the tax filer's SSN, date of birth, filing status and address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file
- Click "continue"
- Select "Higher Education/Student Aid" as reason for requesting the transcript. Select the return transcript for the appropriate year
- Print or save the transcript and submit to the Financial Aid Office

Telephone Request

- Available from the IRS by calling 1.800.908.9946
- Tax filers must follow prompts to enter their SSN and the numbers in their street address. Generally, this will be the numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file
- Select "**Option 2**" to request an IRS Tax Return Transcript and then enter the appropriate year
- 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.

IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS

Paper Request Form-IRS Form 4506-EZ

- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- 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
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. Please do not have your IRS Tax Return Transcript mailed directly to the Financial Aid Office. We may have difficulty matching you if your name has changed or if it is your parent's tax return
- On line 6, enter the year you want to receive IRS tax information for the tax year that is required for the current FAFSA
- 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 4506T-EZ to the appropriate address (or fax number) provided on page 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