



IRS Tax Return Transcript Request Process

The **IRS Data Retrieval Tool** allows students and parents to access the IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA). Students and parents may transfer the data directly into their FAFSA.

If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using the tool for several reasons:

1. It's the easiest way to provide your tax data.
2. It's the best way of ensuring that your FAFSA has accurate tax information.
3. You won't need to provide a copy of your or your parents' tax returns to your college.

To utilize the **IRS Data Retrieval Tool**:

1. Enter your PIN* and click **Link to IRS** (*You will not be asked to enter your PIN if you entered a PIN to begin your FAFSA.)
2. Your FAFSA will be saved and you will be transferred to the IRS Web site.
3. On the IRS Web site, enter requested information.
4. Once the IRS has validated your identification, your IRS tax information will display. You can either transfer your information from the IRS, or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return from the IRS Web site, you will have to login to open your saved FAFSA.
5. If you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS".

If you do **not** use the IRS Data Retrieval Tool to provide tax information and your college requests a copy of your tax return or your parents' tax return, you may be required to obtain an **official tax transcript from the IRS**.

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 **Tools** section of the homepage click “**Order a Return or Account Transcript**”
- Click “**Order a Transcript**”
- Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal code. Use the 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**”
- In the **Type of Transcript** field, select “**Return Transcript**” and in the **Tax Year field**, select the year you would like to request.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5-10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online **cannot be sent directly to a third party** by the IRS.

Telephone Request:

- Available from the IRS by calling **1-800-908-9946**
- Tax filers must follow prompts to enter their Social Security Number 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 desired 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 5-10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone **cannot be sent directly to a third party by the IRS**.

Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.
- 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. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. Institutions are responsible for notifying aid applicants whether to list the institution as third party to receive the Transcript or not. Some institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different. (**PLEASE NOTE:** since **Hofstra** requires student identification numbers on all incoming financial documents, we **DO NOT** accept the tax transcript as a 3rd party.)
- On Line 6, enter the year you would like to receive the IRS tax information for that is required for the 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 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5-10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.