



IRS Tax Return Transcript Request Process For 2017-2018 Financial Aid Verification

Tax filers can request a transcript, free of charge, of their **2015** tax return from the Internal Revenue Service (IRS) in one of three ways. Due to changes in federal financial aid regulations, institutions can no longer accept personal copies of federal income tax returns to satisfy financial aid verification requirements.

Financial aid applicants should not list SUNY New Paltz as the third party to receive the IRS Tax Return Transcript since institutions will have difficulty matching incoming IRS Tax Return Transcripts to the financial aid applicant. It is required that all IRS Tax Return Transcripts be received directly by the tax filer and for all tax return transcripts to be submitted to the SUNY New Paltz Office of Financial Aid in one packet. **For a joint tax return, use the primary tax filer's information.**

****Please note that the filer must sign the IRS tax return transcript at the bottom of the first page.****



Option #1: Online Request

- ✓ Go to the IRS Web site at www.irs.gov.
- ✓ In the “**Tools**” section of the homepage click “**Get a Tax Transcript**”.
- ✓ Click the “**Get Transcript by Mail**” section.
- ✓ 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 U.S. 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 “**2015**”. Do not select “**Account Transcript**” as this is not a copy of the entire tax return. **The “Return Transcript” is the IRS document that should be requested.**
- ✓ Click “**Continue**”. If successfully validated, a screen will appear that states the request for a 2015 Return Transcript has been accepted. Tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the online request was successfully transmitted to the IRS.

See reverse for other information.



Option #2: Telephone Request

- ✓ Available from the IRS by calling **1-800-908-9946**.
- ✓ Tax filers must follow the prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed either directly with the IRS or through the U.S. Postal Service, the IRS may have the updated address on file.
- ✓ Listen to the information. Select **“Option 2”** to request an IRS Tax Return Transcript and then enter **“2015”**.
- ✓ 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 by telephone can't be sent directly to a third party by the IRS.



Option #3: Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

- ✓ Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf> or at <http://www.irs.gov/pub/irs-pdf/f4506t.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 either directly with the IRS or with the U.S. 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. Financial aid applicants should not list SUNY New Paltz as the third party to receive the IRS Tax Return Transcript since institutions will have difficulty matching incoming IRS Tax Return Transcripts to the financial aid applicant.
- ✓ Enter the year **“2015”** to receive IRS tax information for the 2015 tax year that is required for the 2016-2017 Free Application for Federal Student Aid (FAFSA) or the tax form number that is being requested (1040, 1040A, 1040EZ, etc.).
- ✓ Mail or fax the completed form to the appropriate address (or FAX number) provided on page 2 of the form.
- ✓ Tax filers can expect to receive their transcript within 5 to 10 business days from the time the IRS receives and processes their signed request. NOTE: Processing the form 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.