

WILLIAM PENN UNIVERSITY

Options for obtaining tax information for FAFSA Verification

IRS Data Retrieval	Online	Telephone	Online (mail request)	Paper Request
<p>Sign into the FAFSA using the student's FSA ID and password.</p> <p>Click on the icon that says <u>Make FAFSA Corrections</u>.</p> <p>Once the FAFSA is open, navigate to the financial tab. Follow the prompts for transferring the tax information directly from the IRS website to the FAFSA website.</p> <p>Note: You will not be able to see the figures that are transferred. This is for your protection against identity theft. You will need to manually put in the wages if you filed a joint return.</p> <p>Once the information is transferred, you will need to be sure to retransmit the FAFSA.</p>	<p>Go to www.irs.gov</p> <p>Click on the Get My Tax Record Icon.</p> <p>Click on the Get Transcript ONLINE icon. Make sure to request the IRS Tax <u>Return</u> Transcript and NOT the IRS Tax Account Transcript.</p> <p>To use Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as credit card account number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.</p>	<p>Call IRS at 1-800-908-9946. You will be prompted to enter your Social Security Number and street address.</p> <p>You will need to use the primary tax filer's (first person on the return) name and social security number.</p> <p>Select Option 2 to request an IRS tax <u>return</u> transcript and enter the year 2017.</p> <p>If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript within 5 to 10 days. You must then forward the transcript onto the financial aid office.</p>	<p>Go to www.irs.gov</p> <p>Click "Get Transcript BY MAIL." Make sure to request the IRS Tax Return Transcript and NOT the IRS Tax Account Transcript.</p> <p>Follow the prompts to request your transcript. You will want a tax return transcript.</p> <p>If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript within 5 to 10 days. You must then forward the transcript onto the financial aid office.</p>	<p>Go to IRS.gov. Download and print a 4506T.</p> <p>Complete lines 1-6, sign and date the form. Sign your name exactly like it is on the tax return.</p> <p>Mail or fax the completed IRS Form 4506T to the appropriate address (or FAX number) provided on page 2 of the IRS Form 4506T.</p> <p>Note: If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.</p>

If you are unable to get the IRS Information because of special circumstances (ie: amended tax return, identity theft) - Please contact the Financial Aid Office