

It is the student's responsibility to submit the Verification Worksheet and applicable tax documents to the Financial Aid office. **We will NOT accept tax documents sent directly from the IRS.**

If you or your parent filed an **amended tax return**, and are selected for verification, you must submit both an IRS Tax Return Transcript **AND** a signed copy of your 1040X.

For a faster alternative:

The fastest way to submit your official 2017 IRS tax data is to use the IRS Data Retrieval Tool (DRT) to transfer official 2017 IRS tax data to your FAFSA. Here's how:

1. Go to www.fafsa.gov.
2. Log into the FAFSA and select Financial Information tab
3. Update the tax filing status to "Already Completed"
4. Answer additional questions and then when presented, click "**Link to IRS**"
5. On the IRS website, enter the requested information exactly how it appears on the tax return
6. After the IRS has validated the tax payer's identification, IRS tax data will display. Check the box to transfer the information from the IRS and click transfer now.
7. Be sure to fully submit these changes to your FAFSA and print out the confirmation page before logging out.

Requesting a Tax Return Transcript

Tax filers can request a 2017 IRS Tax Return Transcript free of charge, using one of the three methods below:

NOTE: Please do not request to have the tax return transcript sent directly to Talladega College because we cannot identify who the tax return transcript belongs to. Don't forget to write your student ID# on each page of the tax return transcript!

1. Get Transcript online requests

Get Transcript is an IRS online service that provides an electronic copy of an official IRS transcript.

Go to <http://www.irs.gov/Individuals/Get-Transcript>

- **Get Transcript by mail** delivers transcript in 10 calendar days via postal mail to the address of record.
- **Get Transcript Online** displays PDF version of transcript for users to view, print, and/or save. Additional authentication is required to establish a user account. A tax filer who is not able to successfully register for the Get Transcript Online will be able to request a tax return transcript using one of the other methods.

To use the new **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) and
- 3). Specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan)

2. 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 are listed on the 2017 tax return. However, if an address change has been completed through the U.S. Postal Service, the IRS may not have the updated address on file.
- Select **Option 2** to request an IRS Tax Return Transcript and then enter **2016** as **the year you are requesting**.
- 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 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.

3. 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 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 U.S. Postal Service, the IRS may not have the updated address on file.
- **NOTE:** Please do not request to have the tax return transcript sent directly to Talladega College because we cannot identify who the tax return transcript belongs to. Don't forget to write your student ID# on each page of the tax return transcript!
- On Line 6, enter **the year you are requesting** to receive IRS tax information.
- 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 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.

IRS Tax Assistance Centers - In Person Requests

- Most IRS Taxpayer Assistance Center (TAC) have converted to appointment only service.
- TAC should not be used as a routine resource for documentation requests
- For taxpayers who still need to interact with the IRS in person:
 - Call special toll-free number, 1-844-545-5640 to reach an IRS representative. Representatives can help resolve a tax issue or schedule an appointment at a local IRS TAC office.