Requesting an IRS Tax Transcript

What is Verification? When you submit the FAFSA-on-the-Web, you may be federally selected for a process called “verification.” This means the Department of Education requires the Office of Financial Aid to determine the accuracy of the information you provided through your FAFSA-on-the-Web application. If you are required for verification, you must complete the IRS Data Retrieval Feature on FAFSA-on-the-Web in compliance with Federal guidelines before any Federal aid can be awarded.

Should You Request an IRS Tax Transcript? If you or your parent cannot (or choose not to) complete the IRS Data Retrieval, then you may request an IRS transcript (after you complete your taxes) and submit it to the Financial Aid Office. You must request an IRS transcript if:

- You (or your parent) did not use the IRS Data Retrieval Process either at initial FAFSA filing or through subsequent corrections.
- You changed information after using the IRS Data retrieval process.
- Your tax status is ‘Married, filing separately.’
- Your parents filed separate tax returns.
- You (or your parent) had a change in marital status after the end of the tax year on December 31.
- You (or your parent) filed an amended tax return.
- You filed taxes outside the U.S.

How Can You Request an IRS Tax Transcript?

✓ Step 1—On the IRS website (www.irs.gov) choose “Order a Tax Return or Account Transcript.” (See Figure 1-1)
Step 2—Below option number “3”, (“Go get your transcript!”) select “Order a Transcript” (See Figure 1-2). Or you may call 1-800-908-9946, or request a return transcript by using the IRS form 4506T-EZ (See figure 1-3).

Figure 1-2

Figure 1-3
✓ Step 3— Enter your information and request a tax return transcript for the proper year. (See Figure 1-4)

NOTE: Be sure to request a “Return transcript,” NOT an “account transcript.”

Figure 1-4

✓ Once you receive your transcript (within 5 to 10 days), submit it to The Office of Financial Aid for verification.

✓ Contact our office if you have any questions:

The Office of Financial Aid
21726 Placerita Canyon Road, Santa Clarita, CA 91321
(661) 263-2290 | www.masters.edu/finaid