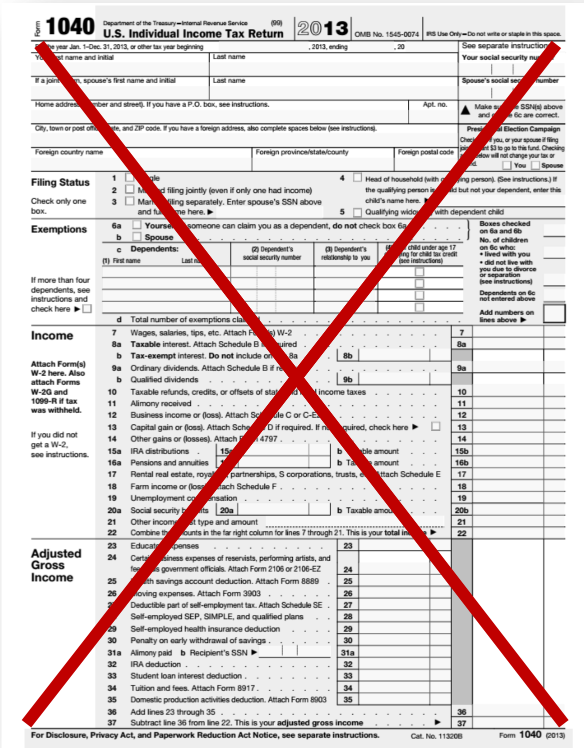
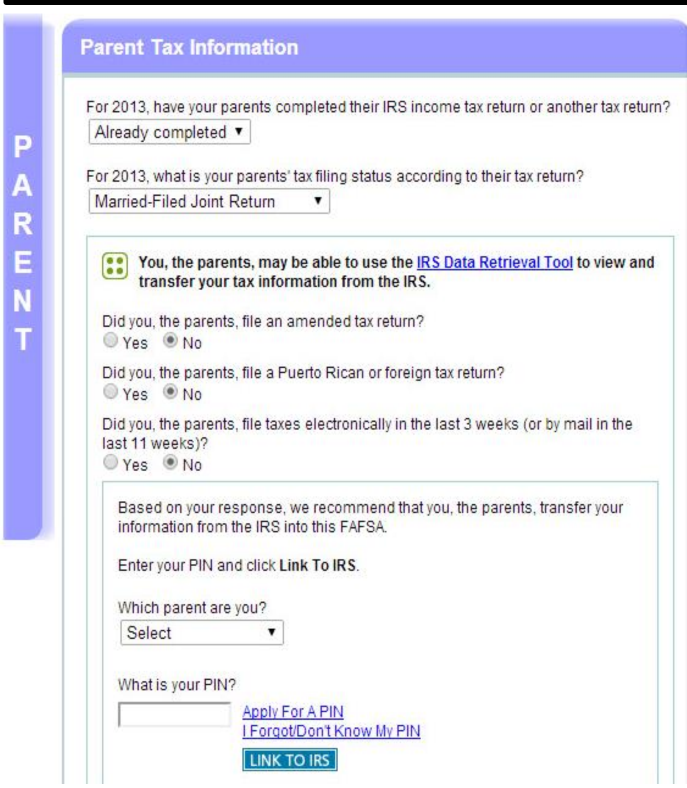
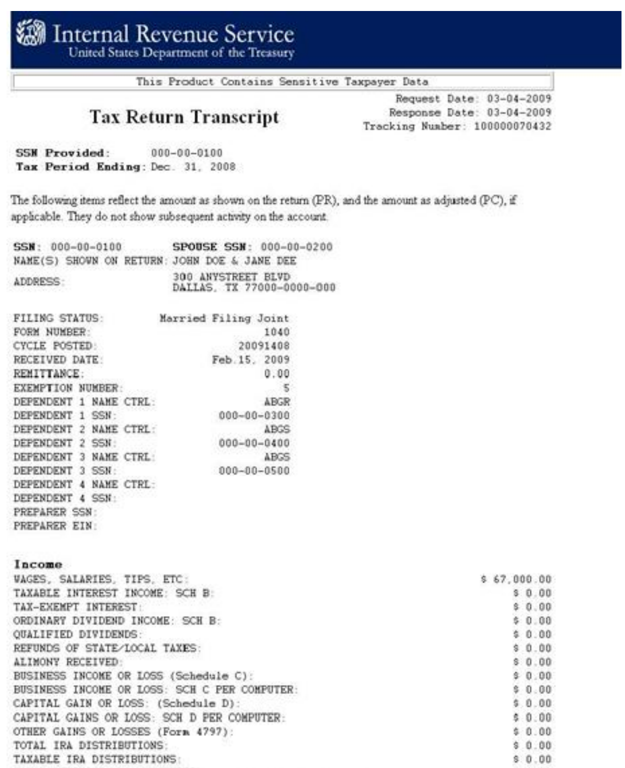
HOW TO SUBMIT TAX INFORMATION TO THE FINANCIAL AID OFFICE:



The Financial Aid Office *cannot* accept the IRS forms 1040, 1040A, or 1040EZ.

You must either use the IRS Data Retrieval Tool on the FAFSA or submit an IRS Tax Return Transcript to the Financial Aid Office to verify tax information.





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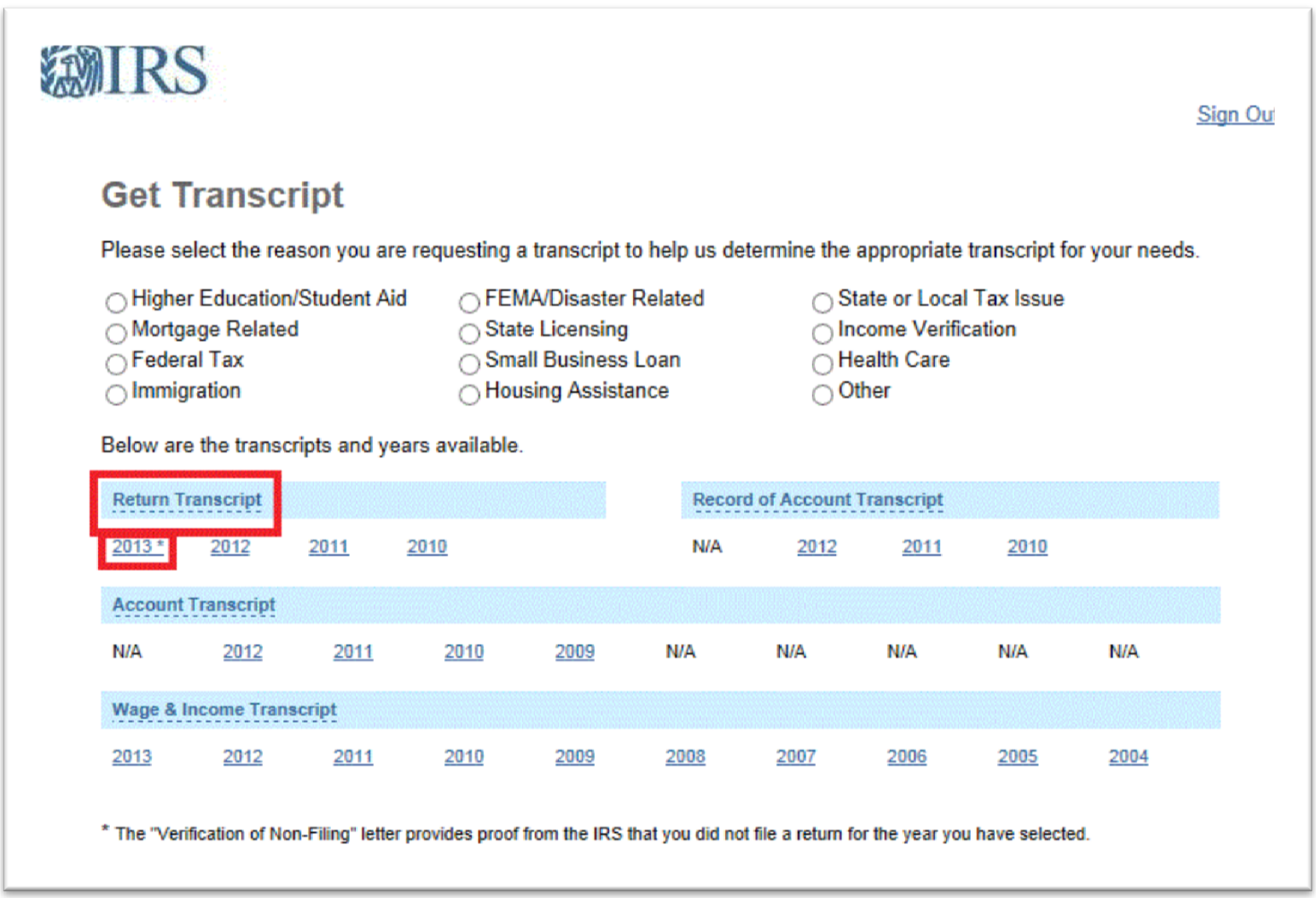
<u>Tax Return Transcript Online Request</u>

- ✓ Visit the IRS Web site at www.irs.gov
- ✓ In the **TOOLS** section of the homepage click "**Get Transcript of Your Tax Records**".
- ✓ Click "**Get Transcript Online**".
- ✓ You will need to create an account if you have not done so before.
- ✓ After Step 1 is completed, you will need to access the email account provided during Step 1 to be able to click on the confirmation link.

  Note: *Use the address currently on file with the IRS*. Generally this will be the address that was listed on the latest tax return filed.
- ✓ After you have successfully set up your account, select the "**Return Transcript**". ***<u>The 2014-2015 FAFSA will require "2013".</u>***
- ✓ The transcript you have requested will open in a new window.



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TELEPHONE REQUEST

- ✓ Call the IRS at **1-800-908-9946**
- ✓ Follow prompts to enter the social security number and the numbers in the street address. Generally this will be numbers of the street address that were 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 enter the appropriate aid year "**2013**".
- ✓ 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.
- ✓ IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

MAIL REQUEST

- ✓ Use IRS Form 4506T-EZ, downloaded 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.
- ✓ On line 6, enter the appropriate aid year "**2013**"
- ✓ 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 to 10 days from the time the IRS receives and processes their signed request.

IN-PERSON REQUEST

Please attempt to request the transcript online before visiting the IRS Office.
Assistance is available in the Financial Aid Computer Lab.

- ✓ Visit 751 Daily Drive Suite #101, Camarillo, CA Phone: (800) 829-1040
- ✓ Request a **Tax Return Transcript** for the appropriate aid year.