



Tax Information Request Instructions

Complete IRS Data Retrieval through your FAFSA

- Log into your FAFSA with your FSA Username and Password
- Click the “Financial Information” tab
- Clarify if you’ve marked you’ve “already completed” tax filing status
- Answer “yes” or “no” if you:
 - had to correct errors (amend) your previously submitted taxes
 - if you filed a foreign or Puerto Rican tax return
- If you are eligible for data transfer, a button for “View Option to Link to IRS” will appear.
- Click the button for “**Link to IRS**” to leave the FAFSA website temporarily
- Enter personal identifying information
 - Exact address that was listed on your most recent tax return
- Once submitted, the IRS site will identify what answers will be transferred to your FAFSA
- Select the box for “Transfer My Information now” and click the “Transfer Now” button. You will return back to the FAFSA “Financial Information” tab.
- Click “Save” at the bottom of the screen and follow the prompts to move through the rest of the application.
- Students should be prepared to re-sign (with the FSA ID) and re-submit your FAFSA. ➤ If you update information for both student and parent, you will need the parent to “re-sign” using their FSA ID.

- TSJC will receive the electronic transferred results within **5-7 business days**.

Request a Tax Return Transcript/Verification of Non-Tax Filing to be mailed through www.irs.gov

- Visit www.irs.gov
- Click on “Get Your Tax Record” on the right side of the screen

- **“Get a Transcript by Mail”**
 - Enter SSN, birthdate and address to confirm your identity and records on file
 - You must use the exact address that was listed on your most recent tax return
 - Select “return transcript” and appropriate year from menu”
 - Mail request option will be sent within 5-10 business days to address on file with IRS

OR

- **“Get a Transcript Online”**
 - May have to create an online account to access; remember user name and email
 - Enter SSN, birthdate and address to confirm your identity and records on file
 - You must use the exact address that was listed on your most recent tax return
 - Financial Account Information may be verified
 - Online option will allow you to print or save directly from website

Complete 4506-T Form and send to IRS office

- Provide Demographic Information for lines 1 through 5
- Select the Type of Tax Document you’d like to request:
 - Line 6a : Select the checkbox on the right hand side for Return Transcript
 - Line 7: Select the checkbox on the right hand side for Verification of Non-filing
 - Line 8: Select the checkbox on the right hand side for Form W-2 or 1099 (to demonstrate amount earned)
 - Line 9: Year or period requested field, enter “12/31/2018”.
- The non-filer must sign and date the form and enter their telephone number. Only one signature is required when requesting a joint IRS Verification of Non-filing.
- Mail or fax the completed IRS Form 4506-T to the address (or FAX number) provided on page 2 of Form 4506-T.