

IRS Tax Transcript Options

The Wesley College Student Financial Aid Office recommends using either the online request, or utilizing the “IRS DATA Retrieval” option on the FAFSA in order to satisfy transcript request. See below for details.

Option #1: IRS Data Retrieval Option

Once your Federal taxes have been filed for a period of **3 weeks or more**, you may be able to use the “IRS Data Retrieval Tool” on the FAFSA to satisfy the income verification requirements.

- Go to www.fafsa.gov, select “start here” or “login”
- Sign in using your student’s personal information then select “Make Corrections”

To Transfer the Student’s & Parent’s Tax Information

- Go to the students tax information, select “income tax return has been completed”. You will be prompted to answer a few questions, if able to link click on the blue box that says “Link to IRS”
- Once you select this box, you will be prompted that you are leaving FAFSA on the web, select OK
- Enter your (student) information **exactly** how it appears on your tax returns on the “Get My Federal Income Tax Information” form and “Submit” the information
- If a successful record match is found on file with the IRS, available data is retrieved
- Check the box “Transfer My Tax Information into the FAFSA” and click on “Transfer Now”
- Go to the Parent Financial Information, Repeat the same steps for your parents
- Once both student and parents’ tax information is transferred onto the FAFSA, make certain to sign the FAFSA using your PIN numbers.
- Corrections will be received in 3-5 business days eliminating our need for the Tax Return Transcript

Option #2: Online Request (View and Print Immediately)

- Step 1- Create an account with the IRS (New Users)
 - Enter name and email address
 - Click send email confirmation code
- Step 2- Retrieve code from your email address provided
 - Enter confirmation code in area provided
 - Click verify email confirmation code
- Step 3-Enter personal information SSN, DOB, Filing Status, and Address
 - Click Continue
- Step 4-Validate Identity (may ask for personal information to verify your identity)
 - Once those questions are answered successfully “Continue”
- Step 5-Security Profile
 - Create security image and questions
 - Create User ID and Password (keep for your records)
- Step 6- Get transcript
 - Select reason “Higher Education/Student Aid”
 - In Return Transcript Box click year “2015”
 - View and Print Transcripts

Option #3: Go to your Local IRS Office:

You can go to your local IRS Office and request, in person, a copy of your IRS Tax Return Transcript.

If you have any difficulty the IRS Help Line is 1-800-908-9946