

The Sage Colleges

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How to Request a Tax Transcript & Use the Data Retrieval Tool

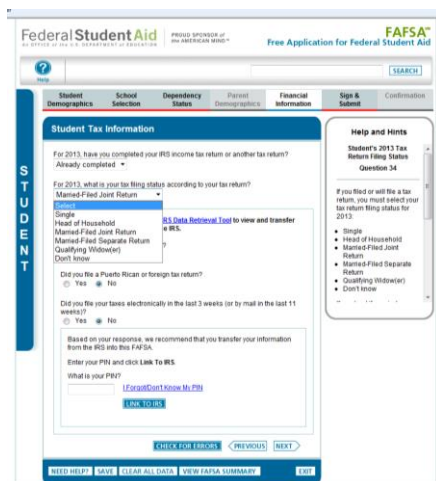
Dear Student,

Below you will find the verification instructions to use the Data Retrieval Tool on FAFSA or to request a Tax Return Transcript.

Using the IRS Data Retrieval Tool

If you did not use the IRS Data Retrieval Tool when you filed your FAFSA, you may still do so.

1. Login at fafsa.gov to “Make FAFSA Corrections”
2. On the FAFSA, in the Financial Information section, click “Link to IRS”
3. On the IRS website, fill out the form and click on “Transfer my tax information into the FAFSA”
4. Make sure you continue to sign and submit your FAFSA

The image shows a screenshot of the FAFSA (Free Application for Federal Student Aid) website. The page is titled "Student Tax Information" and is part of the "Financial Information" section. It asks the student if they have completed their 2013 IRS income tax return or another tax return. Below this, it asks for their 2013 filing status, with options like "Single", "Married Filing Joint Return", "Head of Household", "Married Filing Separate Return", and "Qualifying Widow(er)". A link for "IRS Data Retrieval Tool to view and transfer" is visible. There are also questions about whether they are a Puerto Rican or foreign tax return filer and if they filed electronically. At the bottom, there is a field for the student's PIN and a "Link to IRS" button. The page includes navigation buttons like "CHECK FOR ERRORS", "PREVIOUS", "NEXT", "NEED HELP?", "SAVE", "EDIT OR DELETE", "VIEW FAFSA SUMMARY", and "EXIT".

You will be unable to use IRS Data Retrieval Tool if:

- *Your marital status changed after December 31*
- *You filed an amended return (See Instructions below)*
- *You filed married filing separately*

- You filed a foreign tax return - Submit a signed copy of your return to the financial aid office
- The home address on the FAFSA does not match the address on the tax return

Requesting a IRS Tax Transcript

If you are selected for verification of your FAFSA, and are unable to use the IRS Data Retrieval Tool, you must submit an official [IRS TAX RETURN TRANSCRIPT](#), (not an Account Transcript.) There are 4 ways to obtain the transcript:

Request Method	Where?	What?	How?	When?	Send to Third Party?
Online (Get Transcript)	www.irs.gov/transcript	Paper	Mailed	5-10 days	No
IRS2GO Mobile App	www.irs.gov	Paper	Mailed	5-10 days	No
Telephone	(800)-908-9946	Paper	Mailed	5-10 days	No
IRS Form 4506T-EZ	www.irs.gov/pub/irs-pdf/f4506tex.pdf	Paper	Mailed	5-10 days	Yes

According to the IRS, the preferred method of obtaining a Tax Return Transcript is by using the “Get Transcript” online option. This is the quickest way of obtaining your transcript.

Using the “Get Transcript” Option

You will have to sign up for an account by establishing a username and password. Once an account has been set up, you will be able to choose a transcript to be mailed.

The screenshot displays the IRS website's "Get Transcript" page. At the top, there are navigation tabs for "Filing", "Payments", "Refunds", "Credits & Deductions", "News & Events", "Forms & Pubs", "Help & Resources", and "for Tax Pros". A search bar is located in the top right corner. The main heading is "Get Transcript". Below this, there is a "Related Forms" section with the following links:

- Form 4506, Request for Copy of Tax Return
- Form 4506-T, Request for Transcript of Tax Return
- Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript
- Formulario 4506T-EZ (SP), Formulario Abreviado para la Solicitud de un Traslado de la Declaracion de Impuestos Personales

Below the "Related Forms" section is a "Related Websites" section with the following links:

- Social Security Administration (SSA) - My Account
- Free Application for Federal Student Aid (FAFSA)

A prominent blue button with a white envelope icon says "Get Transcript by MAIL". Below this button, there are four bullet points:

- Transcripts arrive in 5 to 10 calendar days at the address we have on file for you
- [Transcript Types](#) available by mail
- [Frequently asked questions \(FAQs\)](#)
- [Get Transcript by Mail en Español](#)

Reminder:

Tax filers can expect to receive their transcript within 5 to 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.

Please submit the tax transcript to the Financial Aid Office at The Sage Colleges; **make sure to include the student' name and student ID number on the transcript. Not providing this information could delay your verification process.**