



FISHER COLLEGE

Office of Financial Aid

118 Beacon Street

Boston, MA 02116

Phone: 617-236-8821

Fax: 617-670-4440

Email: financialaid@fisher.edu

Web: www.fisher.edu/financial-aid

2021-2022 Instructions for Obtaining an IRS Tax Return Transcript

Students and Parents have 5 options for providing a **Tax Return Transcript** to the Office of Financial Aid:

Option #1 - Log back on to your FAFSA to Utilize the IRS Data Retrieval Tool

By using the IRS DRT you are transferring your tax information from the IRS to the FAFSA.

If successful, an updated FAFSA will be sent electronically to the College, and may fulfill your Tax Return Transcript requirement.

Note: *Students who are providing parent(s) information will be asked to first link parent(s) tax information prior to providing their own.*

- Go to studentaid.gov and click '**Apply for Aid**' then click '**Complete the FAFSA form**' and under '**Returning User**' click '**Log In**'
*****Please Note- studentaid.gov is NOT compatible with Internet Explorer. You must use Chrome, Firefox, or Safari Web Browser. *****
- Click '**I am the student**' and log-in using your FSA username and password
- Click on '**Make FAFSA Corrections**' and then create a '**Save Key**'
- Once you enter your FAFSA click on the '**Financial Information**' tab
 - Answer the questions to determine if you're eligible to use the IRS DRT
 - Click '**Link to IRS**' to go to the IRS site
 - Click '**Proceed to IRS Site**' to leave FAFSA on the Web page
 - Click '**OK**' to continue
- You have now entered the IRS website
 - Click '**OK**' to the 'Message from the Webpage'
 - Enter the information as it appears on your Tax Return.
 - *It is best to have your **2019** Tax Return with you as you complete this information
 - **Filing Status** (this information is listed on your Tax Return)
 - Enter your address as it appears on your Tax Return.
 - *If you live in an apartment/unit this information must be entered exactly as it shown on your tax return.**
 - Click '**Submit**' when you've ensured all the information is exactly as it appears on your Tax Return
 - Click the '**Transfer my Tax Information...**' box and then click '**Transfer Now**' to transfer the tax information into the FAFSA
 - You will then be brought back to the FAFSA site and the following message should appear '**You have successfully transferred your 2019 tax information**'
 - *Please note that the tax information on your FAFSA will be populated as '**Transferred from the IRS**' for security purposes
- Next enter your wages from your **2019** W-2s (this information will not transfer)
- Electronically sign the FAFSA with your FSA ID and Password
- Submit the FAFSA in order to process the new corrections



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Option #2 – Online Request to Receive an Immediate PDF of Your Tax Return Transcript

To use the **Get Transcript Online** tool, the user must have: (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan).

Please Note: Due to enhanced security measures the IRS has implemented to mask Personal Identifiable Information on Tax Return Transcripts, you must clearly write the student's name and Fisher ID on the Tax Return Transcript. Tax Return Transcripts submitted without the student's name or Fisher ID may be shredded if it cannot be determined which student the Tax Return Transcript belongs to.

- Go to irs.gov and click **Get My Tax Record**
- Click **Get Transcript ONLINE**
Click **Create Account**
If this is your first time logging into the website, follow the prompts to create an account.
- Once you create an account and you are logged in, select **'Higher Education/Student Aid'** as the reason you need a transcript and click **'Go'**
- In the **RETURN TRANSCRIPT** section click **2019**

*A PDF of your Tax Return Transcript will immediately appear on your screen. **Print 2 copies of your Tax Return Transcript**, one for yourself and one to submit to the Office Financial Aid.*

Option #3 – Online Request to Receive a Copy by Mail

Please Note: Due to enhanced security measures the IRS has implemented to mask Personal Identifiable Information on Tax Return Transcripts, you must clearly write the student's name and Fisher ID on the Tax Return Transcript. Tax Return Transcripts submitted without the student's name or Fisher ID may be shredded if it cannot be determined which student the Tax Return Transcript belongs to.

- Go to irs.gov and click **Get Your Tax Record**
- Click **Get Transcript by MAIL**
- **Enter the required information for the PRIMARY tax filer shown on your Tax Return:**
 - Social Security Number
 - Date of Birth
 - Street Address – **(you must type address exactly as it appears on your Tax Return)**
 - Zip Code
- Click **Continue**
- In the **Select Transcript Type'** field, select **'Return Transcript'** and, in the **'Select Tax Year'**, select **'2019'**
- Click **Continue**
- If the IRS has processed your 2019 Tax Return, a message will appear indicating your request was **accepted**.

*You can expect to receive your transcript by mail (to the address on file with the IRS) within 5-10 business days from the date of your request. **Make a copy of your Tax Return Transcript**, one for yourself and one to submit to the Office of Financial Aid.*



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Option #4 – Telephone Request to Receive a Copy by Mail

Please Note: Due to enhanced security measures the IRS has implemented to mask Personal Identifiable Information on Tax Return Transcripts, you must clearly write the student's name and Fisher ID on the Tax Return Transcript. Tax Return Transcripts submitted without the student's name or Fisher ID may be shredded if it cannot be determined which student the Tax Return Transcript belongs to.

Call the IRS at 1-800-908-9946. Follow the prompts to verify your social security number and the number in your street address. Use the automated system to request a **Tax Return Transcript** (select 'option 2', enter '2019' and press '1' to confirm the year you are requesting).

*You can expect to receive your transcript by mail (to the address on file with the IRS) within 5-10 business days from the date of your request. **Request 2 copies of your Tax Return Transcript**, one for yourself and one to submit to the Office of Financial Aid.*

Option #5 – Request a Copy in Person

Please Note: Due to enhanced security measures the IRS has implemented to mask Personal Identifiable Information on Tax Return Transcripts, you must clearly write the student's name and Fisher ID on the Tax Return Transcript. Tax Return Transcripts submitted without the student's name or Fisher ID may be shredded if it cannot be determined which student the Tax Return Transcript belongs to.

Short of using the IRS DRT, the next quickest way to get a copy of your Tax Return Transcripts and or Wages information, is your local IRS office. It does not have to be near your home of residence. As long as you have a government issued ID you can locate one nearest you to get a copy and they're FREE. Go to <https://apps.irs.gov/app/officeLocator/index.jsp> and enter your zip code and select the mile radius. Please be advised of their office hours and that all offices are closed for Federal Holidays.