

Tax Return Transcript- Frequently Asked Questions (FAQ's)

If the Department of Education requires you to submit certain documents to your school, the Financial Aid Office will inform you of what documents are required. A major change put in place by the Department of Education for this year includes what documents the school must collect and use for tax information. If tax information is required, the following will explain how to get that from the IRS.

If you have received correspondence from the Financial Aid Office requesting an IRS Tax Return Transcript, you have two options:

OPTION 1: Use the IRS Data Retrieval Tool to import tax line information into your FAFSA directly from the IRS. Not everyone will be eligible for this option (see **a.** below). To determine your eligibility to use the tool, return to the [FAFSA](#) website and click on 'Make FAFSA corrections'. You'll scan through your submitted FAFSA information until you get to the Financial Information section. You'll then see the question, 'For 2011, have you completed your IRS income tax return or another tax return?' Answer the eligibility questions, and, if eligible, the Link to IRS information will come up – enter PIN and click 'Link to IRS.' Pop-up windows will notify you that you are leaving the FAFSA site. Once on the IRS website your tax information will appear, and you will need to fill in tax filing status and address information as found on your 2011 federal tax return. If successful, data from your tax form will be brought back to the FAFSA website. It is important that you do not make changes to any data that is populated from the IRS. The student (and parent, if applicable) would continue in the application and sign and submit the application. For additional assistance using the tool – see IRS Data Retrieval FAQs). If you retrieve the IRS data, and leave it unchanged, you will not need to submit Tax Return Transcripts to the Financial Aid Office.

a. You are ineligible to use this tool and should use Option 2 below if:

- i. You filed married filing separately
- ii. You are married and you filed as Head of Household
- iii. You filed an amended tax return
- iv. You filed an electronic tax return less than two weeks ago
- v. You filed a paper tax return less than six weeks ago
- vi. Your address on the FAFSA is different from the address on your 2011 Tax Return
- vii. Your current marital status is different than it was on your 2011 Tax Return.
- viii. You filed a Puerto Rican or foreign tax return

OPTION 2: Contact the IRS to obtain a free copy of your 2011 IRS Tax Return Transcript (see [How can I obtain a free copy of an IRS Tax Return Transcript?](#))

The following FAQs are provided to help you obtain your Tax Return transcript if necessary. DO NOT submit tax information to the Financial Aid Office UNLESS it is specifically requested on a letter you receive from the Financial Aid Office or in an email to your UW Green Bay student email account.

[How can I obtain a free copy of an IRS Tax Return Transcript?](#)

[Do I need to sign my tax return transcript?](#)

[The IRS says my tax return transcript is unavailable or they cannot locate it. What should I do?](#)

[Can I get multiple copies of my transcript if I am applying to more than one school?](#)

[My current address is different from what's on my 2011 tax return. What do I do?](#)

[Can I have the 2011 IRS Tax Return Transcript sent directly to the school?](#)

[I used the IRS Data Retrieval on my FAFSA, and my untaxed pension or untaxed IRA distribution rollover was incorrectly brought forward. What do I do?](#)

[I filed a joint tax return but now I'm divorced or separated. What should I submit?](#)

[I was single when I filed my tax return, but now I'm married. What should I submit?](#)

[I filed an amended tax return, what do I need to submit?](#)

[I was granted a filing extension by the IRS, what should I do?](#)

[I still owe a tax liability for 2011 and the IRS won't give me a copy of my tax return transcript, what should I do?](#)

[I filed a foreign tax return for 2011, what should I do?](#)

[I am a Non-tax filer. What do I need to submit?](#)

[Contact Information- WI IRS Offices](#)

How can I obtain a free copy of an IRS Tax Return Transcript?

1. On line: Go to www.irs.gov and click [Order a Tax Return Transcript](#). Note you must use the primary tax payer's information if you filed jointly. You should receive the tax return transcript via US Postal Service within about 10 business days.
2. Phone: Call 1-800-908-9946 and request the Tax Return Transcript. If you filed married filing jointly you must know the primary tax payer's information in addition to your own information (full name, Date of Birth, SSN, tax filing status). You should receive the tax return transcript via US Postal Service within about 10 business days. You can also request to have the tax return transcript faxed directly to you provided you are physically located at the fax number.
3. Form **4506T-EZ** available online at www.irs.gov (this is a free request). Use this form if your current address is different than what it was on your 2011 Tax Return or if you wish to have your Tax Return Transcript sent directly to a 3rd party (the school). Complete, sign and send (via mail or fax) to the correct processing location indicated on page 2 of the form. You should receive the Tax return transcript via US Postal Service within 2-3 weeks.

Do I need to sign my tax return transcript before sending it to the Financial Aid Office?

It is recommended that you sign your tax return transcript, but it is not required.

The IRS has informed me that my tax return transcript is unavailable or they cannot locate it. What should I do?

1. How long ago did you file? Did you file electronically or via mail? (Electronic applications take 2 weeks and paper applications take about 6-8 weeks to be available).
2. Did you file a joint return? If so, make sure you are listing the primary tax filer's information when requesting the tax return transcript.
3. Do you have an unpaid amount due to the IRS? If so, there will be a delay in processing your return. Pay your tax liability as soon as possible and then request a tax transcript. The IRS has stated that tax returns for tax filers who have balances due will not be available until May or later.
4. Check to make sure you have entered your address exactly as you did when you filed your taxes.

5. If none of the above apply, you may wish to contact the nearest IRS Office. See bottom of this document for WI contact information.

Can I get multiple copies of my transcript if I am applying to more than one school?

It is recommended that you make multiple copies of your transcript to send to other schools, as obtaining additional copies from the IRS may be time consuming.

My current address is different from what's on my 2011 tax return. What do I do?

If your address has changed since you filed your tax return, you may be able to request a tax return transcript via telephone or you may need to complete form 4506T-EZ to request a free copy of a Tax Return Transcript.

Can I have the 2011 IRS Tax Return Transcript sent directly to the school?

Yes, however, use by parents may not be recommended due to the difficulty in matching student with parent data at the school. You can send transcripts to a 3rd party by submitting a completed copy of IRS Form 4506T-EZ ([click here for instructions](#)).

I used the IRS Data Retrieval on my FAFSA, and my untaxed pension or untaxed IRA distribution rollover was incorrectly brought forward. What do I do?

Do not correct the FAFSA yourself. Submit a copy of your 1099-R to the Financial Aid Office. The 1099-R is necessary to confirm that the amount is a rollover. We will remove the amount from your FAFSA.

I filed a joint tax return but now I'm divorced or separated. What should I submit?

If requested by the Financial Aid Office, you must submit a copy of your joint 2011 tax return transcript. In addition, submit a copy of each tax filer's W2(s) for 2011.

I was single when I filed my tax return, but now I'm married. What should I submit?

If requested by the Financial Aid Office, you must submit a copy of an IRS tax return transcript for yourself and a separate IRS tax return transcript for your spouse.

I filed an amended tax return, what do I need to submit?

If requested by the Financial Aid Office, submit copies of both your Tax Return Transcript **AND** Tax Account Transcript. You may request a tax return and tax account transcript online at www.irs.gov or by calling the IRS at 1-800-908-9946 and requesting BOTH a 2011 Tax Return Transcript AND a 2011 Tax Account Transcript. NOTE: You should request the Tax Account Transcript once you receive approval of your Amended Return from the IRS.

I was granted a filing extension by the IRS, what should I do?

Submit a copy of the Approval for the Extension from the IRS along with copies of W-2s for all tax filers and a signed statement indicating estimates of any self-employment income, AGI, and tax paid to the Financial Aid Office.

I still owe a tax liability for 2011 and the IRS won't give me a copy of my tax return transcript, what should I do?

Pay your tax liability as soon as possible and then request your free tax return transcript from the IRS.

I filed a foreign tax return for 2011, what should I do?

Submit a signed copy of your 2011 tax return along with copies of any income earnings statements.

I am a Non-tax filer. What do I need to submit?

If tax information is requested by the Financial Aid Office and you were not required to file taxes for 2011, you'll need to complete a Verification Worksheet from the Financial Aid Office. Check the box that says you did not and were not required to file, and complete the section that asks for your sources of income. List all income sources with dollar amounts and submit to the Financial Aid Office along with copies of ALL 2011 W-2 form(s).

- If you didn't keep a copy of your W-2(s) – you can contact each employer to obtain a copy. Or contact the IRS (above options) and request a 2011 W-2 Transcript. Please note –2011 W-2 transcripts will not be available until May or June 2012 (therefore it may be faster to obtain a copy through your employer(s)).

Contact Information- WI IRS Offices

Wisconsin IRS Offices

Appleton	920-996-4860
Eau Claire	715-836-8750
Green Bay	920-662-5999
LaCrosse	608-785-0246
Madison	608-829-5827
Milwaukee	414-231-2100