

Ways to get tax information to the Financial Aid Office

Transfer your Tax Data to the FAFSA using the DRT

1. Log in to your current FAFSA form or start a new application at fafsa.gov.
2. In the finances section of the online form, you will see a “Link to IRS” button if you are eligible to use the IRS DRT.
3. Click the “Link to IRS” button and log in with your FSA ID to be transferred to the IRS to retrieve your info.
4. Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the “Submit” button.
5. Check the “Transfer My Tax Information into the FAFSA form” box, and click the “Transfer Now” button.
6. You will know that your federal tax return information has been successfully transferred because the words “Transferred from the IRS” will display in place of the IRS information in your FAFSA form.

For your protection, your tax information will not be displayed when you link to the IRS.

Request a Tax Return Transcript from the IRS Using one of the following options

Online request for mailed Tax Return Transcript

- Visit www.irs.gov/transcript and click the **Get Transcript by Mail** Option or complete, sign and mail to the IRS an **IRS Form 4506-T** to IRS, available online. (NOTE: The 4506-T must be completed accurately and mailed directly to the IRS. This form is NOT submitted to the college.)

To use this service, you need your:

- ✓ *SSN or Individual Tax Identification Number (ITIN),*
- ✓ *date of birth, and*
- ✓ *mailing address from your latest tax return*

What You Get:

- ✓ *Your **Tax Return Transcript** for the requested year*
- ✓ *Transcripts arrive in 5 to 10 calendar days at the address we have on file for you*

Online request for PDF tax return transcript and other tax documents

- Visit www.irs.gov/transcript and click the **Get Transcript Online** Option.

What You Need:

- ✓ your SSN, date of birth, filing status and mailing address from latest tax return,
- ✓ access to your email account,
- ✓ your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- ✓ a mobile phone with your name on the account

What You Get:

- ✓ All transcript types are available online (Note: You must request the **Tax Return Transcript** to satisfies the requirements for your college)
- ✓ View, print or download your transcript
- ✓ Username and password to return later

Telephone Request:

- Available from the IRS by calling 1-800-908-9946
- Tax filers must follow prompts to enter their SSN and the numbers in their street address. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file
- Continue to follow the prompts for retrieving an IRS transcript
- If successfully validated, you can expect to receive a tax transcript at the address in the online request within 5 to 10 days from time the request was successfully transmitted to the IRS
- **IRS Tax Return Transcripts requested via phone cannot be sent directly to a third party**

Make an appointment with your Local IRS Office:

- Call the IRS appointment line **1-844-545-5640** between 7am and 7pm

The Roanoke local IRS office is located in downtown Roanoke:

210 1st Street SW
Roanoke, VA 24011