



IRS Tax Transcript Information

When a student completes a Free Application for Federal Student Aid (FAFSA) or a California Dream Act Application, the student may be selected for verification. If you are selected for verification and you are not eligible to use the IRS Data Retrieval Tool, unable to use the tool or choose not to use the tool to confirm your tax data, then you will need to provide a signed copy of 1040 Tax Return including supporting schedules or request a Tax Return Transcript from the IRS. Once you receive the tax document from the IRS, you will need to submit a copy to the Financial Aid & Scholarships office as one of the required documents to complete your verification.

Do NOT submit copies of your 1040/1040A/1040EZ Tax Return Forms or Transcripts unless our office has specifically requested these items. Do NOT email copies of these items unless they are encrypted.

Transcript Types

The IRS offers the following transcript types at no charge to you:

- **Tax Return Transcript** - shows most line items including your adjusted gross income (AGI) from your original tax return (Form 1040, 1040A or 1040EZ) as filed, along with any forms and schedules. It doesn't show changes made after you filed your original return. This transcript is only available for the current tax year and returns processed during the prior three years. **A Tax Return Transcript meets the requirements of verification for financial aid purposes.**

Note: the secondary spouse on a joint return must use Get Transcript Online or Form 4506-T to request this transcript type. When using Get Transcript by Mail or phone, the primary taxpayer on the return must make the request.

- **Tax Account Transcript** - do not request. This transcript does not meet the requirements of verification for financial aid purposes.
- **Record of Account Transcript** - combines the tax return and tax account transcripts above into one complete transcript. This transcript is available for the current tax year and returns processed during the prior three years. We may request this transcript if the IRS indicated you have amended your taxes.
- **Wage and Income Transcript** - shows data from information received such as Forms W-2, 1099, 1098 and Form 5498, IRA Contribution Information. Current tax year information may not be complete until July. This transcript is available for up to 10 prior years. We may request this transcript if you are unable to provide a copy of all your Form W-2(s) from your employers.
- **Verification of Non-filing Letter** - provides proof that the IRS has no record of a filed Form 1040, 1040A or 1040EZ for the year you requested. It doesn't indicate whether you were required to file a return for that year. This letter is available after June 15 for the current tax year or anytime for the prior three tax years. **A Verification of Non-filing Letter (dated after October 1, 2017) meets the requirements of verification for financial aid purposes.**

Ways to Order Transcripts

- **Get Transcript Online** - You may register to use the “Get Transcript Online” option* at www.irs.gov/transcript to view, print, or download all transcript types listed above.
- **Get Transcript by Mail** - If you're unable to register or you prefer not to use the online option, you may order a **Tax Return Transcript** using the “Get Transcript by Mail” option* at www.irs.gov/transcript or call 800-908-9946. Please allow 5 to 10 calendar days for delivery.
- **Form 4506-T** - You may also request any transcript type listed below by faxing/mailing a “Form 4506-T, Request for Transcript of Tax Return” as instructed on the form. PDF: www.irs.gov/pub/irs-pdf/f4506t.pdf
 - For a **Tax Return Transcript** complete this form and for question 6, enter option A
 - For a **Record of Account Transcript** complete this form and for question 6, enter option C
 - For a **Wage and Income Transcript** complete this form and check box 8
 - For a **Verification of Non-filing Letter** complete this form and check box 7
- **Taxpayer Assistance Centers** - If you need help from a Taxpayer Assistance Center (TAC), call to schedule an appointment. To find an assistance center closest to your location, log on to www.irs.gov/localcontacts
Local Center: 751 Daily Drive, Camarillo, CA 93010
Hours: Monday-Friday 8:30 a.m. - 4:30 p.m.
Phone: (805) 445-4771

* You will be asked to provide personal information such as:

- Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN)
- Date of Birth
- Address as it appears on your most recent tax return filed with the IRS

Note: All identifying information must exactly match the most recent records on file with the IRS when completing your request using the method outlined above. Even a minor difference, such as the use of “Street” or “St” in the tax filer's mailing address, can result in an unsuccessful request.

Additional Required Documents (if applicable)

- **Amended Tax Returns** - If you have submitted an amended tax return you will need to submit all of the following:
 - A signed copy of your Amended Income Tax Return (Form 1040X)
 - A signed copy of the original Tax Return (Form 1040, 1040A, 1040EZ) submitted to the IRS or the Tax Return Transcript or use the IRS Data Retrieval Tool
 - A signed copy of the updated Income Tax Return (Form 1040, 1040A, or 1040EZ) if available to you at no additional cost
- **Identity Theft Victims** - If you are unable to obtain a Tax Return Transcript, you may call the IRS's Identity Protection Specialized Unit (IPSU) toll-free number at 1-800-908-4490. You may request an alternate paper tax return transcript known as the TRDBV (Transcript Database View), which will be accepted by our office for verification purposes. You will also need to submit the signed and dated "Financial Aid Statement" form indicating that you were a victim of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.