

How to Order Your Return Transcript for 2019-2020 Financial Aid Verification

Each year, the Department of Education randomly selects financial aid applicants to complete a verification process. Verification requires you to submit documentation to confirm the data you reported on the FAFSA.

One simple way to accomplish accurate FAFSA completion is to utilize the IRS Data Retrieval Tool (IRS DRT) on the FAFSA web site. The IRS DRT allows applicants who have already filed their taxes to transfer data directly from the IRS into their FAFSA. If you utilize the IRS DRT, *in most cases*, you will not be required to submit your Return Transcript during the verification process.

If you did not use the IRS DRT, you will be required to obtain a Return Transcript directly from the IRS. Photocopies of the Federal Tax Return are not acceptable.

To order your free Return Transcript, choose one of the following options:

- 1.) Order Return Transcript online (USPS mail delivery 5-10 days):
 - Go to <http://www.irs.gov/Individuals/Get-Transcript> and click *Get Transcript by MAIL*.
 - Enter the primary tax filer's (i.e. the person who is listed first on the tax return) Social Security Number, date of birth and street address exactly as it appears on the most recent tax return on file with the IRS, and zip code. Click *Continue*.
 - In *Type of Transcript* field, scroll down to the second option *Return Transcript* and in the *Tax Year* field, select *2017*. Do NOT select Account Transcript.
 - If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request within 5-10 days from the time the online request was transmitted to the IRS.

- 2.) Automated Telephone Request:
 - Call the IRS at 1-800-908-9946.
 - Tax filers must follow prompts to enter the primary tax filer's (i.e. the person who is listed first on the tax return) Social Security Number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed.
 - Select *Option 2* to request an IRS Tax Return Transcript and then enter *2017*.
 - If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.

- 3.) 4056-T Form
 - Go to www.irs.gov/forms-pubs and select or search for 4056-T.
 - Use the tax filer's (i.e. the person who is listed first on the tax return) information to complete the form. *Since this form is used to request multiple types of documents, it is important that you select which one you need.
 - Use the chart provided to determine which address or fax number to send your completed form.

If you are having difficulty obtaining the IRS Tax Return Transcript online and/or through the automated telephone request, you should contact your local IRS branch office. Visit <https://www.irs.gov/help/contact-your-local-irs-office> for locations.

Tax Return Transcripts and all other required verification documentation must be uploaded at <https://umassd.verifymyfafsa.com>

Steps for uploading documents:

1. Create a scanned image of the document or take a clear digital photo
2. Upload the image at <https://umassd.verifymyfafsa.com>
3. After you have uploaded your document, confirm the image is clear and readable before submitting
4. You will have the option to delete uploaded files or add more pages if necessary