

Instructions for Requesting Tax Return Documents

2019-2020

There are three options tax filers may satisfy this requirement, which do not involve payment of a fee.

1. Use the **Data Retrieval Tool (DRT)** when completing the FAFSA online. Further instructions can be found at <https://wofford.edu/financialaid>

2. Retrieve directly from the IRS online at www.irs.gov
 - A. Get Transcript by Mail:
 - Step 1:** Click “Get My Tax Record”
 - Step 2:** Click on “Get Transcript by Mail”.
 - Step 3:** Enter the required information as it is appears on your tax return using the information for the primary taxpayer.
 - Step 4:** Choose **Return** Transcript under Type of Transcript for the 2017 Tax Year.
 - Step 5:** The tax return transcript will be mailed to the address on your tax returns in 5-10 business days. ***Please keep your original and provide us with a copy***

 - B. Get Transcript Online (this is only available for those who have an account on the IRS online system):
 - Step 1:** Click “Get My Tax Record”
 - Step 2:** Click on “Get Transcript Online”.
 - Step 3:** Log-in as a returning user.
 - Step 4:** After logging in, choose “Higher Education/Student Aid” as the reason for your request. Click “Go”.
 - Step 5:** In the RETURN TRANSCRIPT section, click 2017. An asterisk beside 2017 means you have filed but the return has not been processed. You will need to try again later.
 - Step 6:** A PDF of your Tax Return Transcript will immediately appear on your screen. Print two copies, send one to us and retain one for your records. You may also wish to save this file on your computer.

 - C. Use form 4506-T
 - Step 1:** Go to www.irs.gov.
 - Step 2:** Click “Get My Tax Record”
 - Step 3:** On the right hand side, click on “About Form 4506-T”.
 - Step 4:** Click “Form 4506-T”
 - Step 5:** Complete the form 4506-T, selecting box **6a**.
 - Step 6:** Print, sign, and mail or fax the form to the address listed on the back of the form.
 - Step 7:** Upon receipt of the tax return transcript, please submit to the Wofford Financial Aid Office.

3. Submit a **SIGNED** copy of the 1st two pages of your 2017 tax return submitted to the IRS

Office of Financial Aid
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