

## INSTRUCTIONS FOR OBTAINING 2015 TAX INFORMATION

### TAX FILERS

#### Option 1.

#### Log back on to your FAFSA to Utilize the IRS Data Retrieval Tool

Students and parents are unable to utilize the IRS Data Retrieval Tool if their tax filing status is:

Married Filing Separately

Married Parents filing Head of Household

Filed an Amended Tax Return

Filed a Puerto Rican or Foreign Tax Return

Recently Filed (3 weeks for electronic filing, 11 weeks for paper filing)

*If successful, an updated FAFSA transaction will be sent electronically to the College, and may fulfill your Tax Return Transcript requirement.*

#### Option 2. – Online Request to Receive a Copy by Mail

1. Go to [www.irs.gov](http://www.irs.gov)
2. Under the “Tools” heading click “Get Transcript of Your Tax Records”
3. Click “Get Transcript by MAIL” and acknowledge the disclosure pop up box that appears by clicking “OK”
4. **Enter the required information for the PRIMARY tax filer shown on your Tax Return:**
  - Social Security Number
  - Date of Birth
  - Street Address – **(you must use the exact address as it appears on your Tax Return)**
  - Zip Code
5. Click “Continue”
6. In the Type of Transcript field, select “Return Transcript” and, in the for Tax Year field, select “2015”
7. Click “Continue”

If the IRS has processed your 2015 Tax Return a message will appear indicating that your request was accepted.

*You can expect to receive your transcript by mail (to the address on file with the IRS) within 5-10 business days from the date of your request. Once you receive your tax transcript you should forward a copy to our office via mail, email or fax.*

#### Option 3 – Telephone Request to Receive a Copy by Mail

Call the IRS at 1-800-908-9946 and use the automated system to request a **Tax Return Transcript** (select “option 2” and enter “2015”)

*You can expect to receive your transcript by mail (to the address on file with the IRS) within 5-10 business days from the date of your request. Once you receive your tax transcript you should forward a copy to our office via mail, email or fax.*

### NON-TAX FILERS

Students and/or parents who did not file a **2015** federal tax return **must** submit **IRS form 4506T** to the **IRS** (not to Dean College) indicating the **2015** tax year to confirm your non filing status. The IRS will then send a letter to you verifying that you have not filed a tax return for **2015**. **A copy of this letter should be sent to the college.**

The IRS Form 4506T can be found on [www.irs.gov](http://www.irs.gov)

In addition, copies of all 2015 W2 forms received are to be submitted to the Center for Student Financial Planning.