Beginning with the 2012-2013 FAFSA, students, spouses, and parents will be expected to transfer 2011 Federal Tax Return information electronically from the Internal Revenue Service (IRS) onto the FAFSA using the IRS Data Retrieval Tool. This process is easy, fast, and an accurate method to provide tax return information on your FAFSA. The FAFSA on the Web provides instructions to link to the IRS while completing your FAFSA or when updating your FAFSA after your tax return has been filed. The retrieval process will display your tax return information and allow you to transfer it onto your FAFSA. This tax return information, if unchanged, will be considered “verified” for FAFSA purposes and you will not be required to submit a 2011 Federal Tax Return Transcript from the IRS.

The following tax filers are not eligible to use the IRS Data Retrieval Tool:

- Marital status changed after taxes were filed
- Married filing separately
- Filed an amended or foreign tax return

Tax filers who are notified that their FAFSA has been selected for verification, but who are not eligible or choose not to transfer tax return information onto their FAFSA using the IRS Data Retrieval Tool, will be required to submit a paper 2011 Federal Tax Return Transcript from the IRS with their Verification Worksheet.

**How to Request a Paper Federal Tax Return Transcript from the IRS**

**Online Request** (expect to receive the transcript within 5-10 days from the time the request was successfully transmitted to the IRS):

- On the homepage under Tools click “Order a Return or Account Transcript.”
- Under #3 click “Order a Transcript.”
- Enter the tax filer’s social security number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally, this will be the address that was listed on the latest tax return filed.
- Click “Continue.”
- In the Type of Transcript field select “Return Transcript,” and in the Tax Year field select “2011.”
- If successfully validated, tax filers can expect to receive a paper Federal Tax Return Transcript at the address included in their online request within 5-10 days from the time the online request was successfully transmitted to the IRS.
- Federal Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

**Telephone Request** (expect to receive the transcript within 5-10 days from the time the IRS receives the request):

- Available from the IRS by calling 1-800-908-9946.
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally, this will be the numbers in 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 “2011.”
- If successfully validated, tax filers can expect to receive a paper Federal Tax Return Transcript at the address that was used in their telephone request within 5-10 days from the time the IRS receives the request.
- Federal Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

**Paper Request Form – IRS Form 4506T-EZ** (expect to receive the transcript within 5-10 days from the time the IRS receives and processes your signed request):

- Complete lines 1-4, following the instructions on page 2 of the form.
- Line 5 provides tax filers the option of having their Federal Tax Return Transcript mailed directly to a third party, however, The University of Toledo is not able to process transcripts sent directly from the IRS. DO NOT HAVE THE TRANSCRIPT MAILED TO THE UNIVERSITY OF TOLEDO.
- On line 6 enter “2011” to receive IRS tax information for the 2011 tax year.
- The tax filer (or spouse, if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address or fax number provided on page 2 of the form.
- Tax filers can expect to receive their transcript within 5-10 days from the time the IRS receives and processes their signed request. NOTE: Processing includes verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.