How to Submit Federal Tax Information

How to submit Student/Parent Tax Return information: The government no longer allows colleges to accept copies of a 1040 Tax Return. Instead, there are two ways to submit your Tax Return information:

**Option 1 – IRS Data Retrieval Tool** (quickest and easiest)

You will not be able to use Option No. 1 if:
- Your married but your tax filing status was “married, filing separately” or “head of household”.
- You filed an amended tax return.
- You filed a Puerto Rican or foreign tax return.

Use the “IRS Data Retrieval” tool by correcting your Free Application for Federal Student Aid (FAFSA) online.
- Two weeks after e-filing your taxes (eight weeks if filed by mail), go to the FAFSA website at [fafsa.gov](http://fafsa.gov).
- Click on “Make a correction” in the Returning User section and log into your saved FAFSA.
- Click on “Make FAFSA Corrections” at the bottom of the welcome page.
- Once in your FAFSA, click on “Financial Information”
- Select that you’ve “Already Completed” your IRS Income Tax Return and answer the prompted questions.
- Enter the appropriate Federal Student Aid PIN and then click on “Link to IRS.”
- You will be asked to leave the FAFSA website because you are going to IRS website.
- Complete all required information, click “Submit”.
- Check “Transfer My Tax Information into the FAFSA” box and then click the “Transfer Now” button.
- Repeat the steps above in the “Parent Tax Information” section, if applicable.
- Once you see on your FAFSA “You have successfully transferred your IRS tax information.” message, click on “Sign & Submit” to fully submit your changes.

**Option 2 – Request a Tax Return Transcript from the IRS**

How to request an IRS Tax Return Transcript: The IRS offers three ways to order a transcript:

- **Online**
  - Go to [irs.gov/Individuals/Get-Transcript](http://irs.gov/Individuals/Get-Transcript)
  - Click on “Get Transcript Online”
  - Create an account.
  - Enter the information of the 1st person listed on your tax return.
  - When entering the information, use the exact information that was reported on the tax return. For example, if a word in the address was abbreviated, use the same abbreviation.
  - Under Type of Transcript, select “Return Transcript.”
  - Under Tax Year, select the appropriate year and then click “Continue.”

- **Phone**
  - Call (800) 908-9946 and request a Tax Return Transcript for the appropriate year.

- **Mail / Fax**
  - Go to [irs.gov/Individuals/Get-Transcript](http://irs.gov/Individuals/Get-Transcript)
  - Click on “Form 4506-T” towards bottom of page.
  - On the form complete the following:
    - #1a – 5.
    - #6: enter 1040, 1040A or 1040EZ.
    - #6a: check this box.
    - #9: enter the appropriate date.
  - Print, sign and mail/fax form to IRS:
    - For California:
      - Fax: (559) 456-5876
      - Mail: RAIVS Team, Stop37106, Fresno, CA 93888
    - For any other states/territories, please refer to page two of the 4506-T form.

Before submitting to Student Financial Services:
- We recommend you make a copy of the Tax Return Transcript for your records.
- Write the student’s name and APU ID number at the top of the first page.