



## Options for Submitting your 2023 Tax Information

For the 2025-2026 Free Application for Federal Student Aid (FAFSA) form, you must use federal tax information from your completed 2023 tax return. On occasion, The Department of Education will require institutions to confirm 2023 tax date listed on the FAFSA for the parent and/or student. Institutions can verify this information by the successful and unchanged use of the IRS (Internal Revenue Service) Data Retrieval Tool, or by submitting a US Tax Return Transcript, IRS Tax Return 1040, Amended Tax Return Form 1040x or Foreign Tax Transcript. Below are the options for completing tax requests.

### **Option 1:** **US Tax Return Transcript**

Tax filers can request a return transcript, **free of charge**, of their 2023 tax return from the IRS in one of five other ways.

#### **Online Request**

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov).
- On the homepage, click “Get My Tax Record.”
- Click “Get Transcript Online” or “Get Transcript by Mail.”
- 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. Enter the address and confirm it is the exact postal address being used.
- Click “Continue”
- In the Type of Transcript field, select “Return Transcript” and in the Tax Year field select “2023”.
- 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 to 10 days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

#### **Telephone Request**

- Available from the IRS by calling 1-800-908-9946
- Follow prompts to enter Social Security Number and the numbers in the street address. Usually, these will be the numbers of the street address that was listed on the latest tax return filed, but if IRS does not find a match, use the address listed on the USPS website listed above.
- Select to request an IRS “Tax Return Transcript”, and then enter “2023”.
- 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.
- IRS Tax Return Transcripts by telephone cannot be sent directly to a third party by the IRS.



**Option 2:**  
**IRS Tax Return 1040**

The IRS Tax Return 1040 is what individual taxpayers use to file their taxes with the IRS each year. These forms are retained by the tax filer after submission each year.

For our office to take in an IRS Tax Return 1040, the form must:

- Filed with the IRS,
- Signed by the tax filer on the 2<sup>nd</sup> page of the form to verify this is the correct form filed with the IRS. There is a section that states "Sign Here,"
- Turns in any additional Schedules 1, 2 or 3 you may have,
- And any additional documents specifically requested.

**Option 3:**  
**Foreign Tax Transcript**

Foreign Tax Transcript is for those individuals who filed taxes in a foreign country. Our office would need the equivalent to the US Tax Return Transcript/IRS Tax Return 1040 that was filed in another country converted to U.S. dollars.