FINANCIAL AID OFFICE

IRS Request for 2012 Transcript of Tax Return

Instructions for Parents

If your parents filed a 2012 federal tax return with the IRS, they may be eligible to use the **IRS Data Retrieval Tool***, which is the best and easiest way to provide accurate tax information. With just a few simple steps you can view information from your parents' IRS tax return and transfer that information directly into your 2013-2014 FAFSA (fafsa.gov). If you transfer the data from the IRS to your FAFSA, you will not be required to provide a transcript of tax return. Once our office receives verification that the information was retrieved from the IRS (and remains unchanged), the IRS Tax Transcript requirement will be waived. This option is only available for married parents if they filed a joint tax return.

**The IRS Data Retrieval Tool option is currently not available for students who completed the CA Dream Application. You must provide a copy of the 2012 Transcript of Tax Return from the IRS*.

A separate Transcript of Tax Return is needed for each tax return filed

Your parents are required to provide a 2012 Transcript of Tax Return from the IRS to verify income information provided on your FAFSA or CA Dream Application (if AB540). A transcript of tax return shows most line items from your parents' federal tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. It does not reflect any changes your parents, their representative or the IRS made after the return was filed. **If your parents are married but filed separate federal tax returns in 2012, we need a tax transcript for each parent.** If your parents are not eligible or choose not to use the IRS Data Retrieval Tool you have several options for providing this information.

- Order a Transcript of Tax Return online at IRS.gov. Click on "Order a Return or Account Transcript" and then click on "Order a Transcript". Provide the required information to request a "Return Transcript" for "2012". Online requests cannot be processed if you need the transcript mailed to an address other than the one the IRS has on file for your parents.

OR

- Fill out the Short Form Request for Individual Tax Return Transcripts (Form 4506T-EZ). Go to the IRS website at http://www.irs.gov/pub/irs-pdf/f4506tez.pdf and complete the form. For question #6 your parents should enter "2012". Be sure a parent signs the bottom of the page where it says "Sign Here". The form must be printed and mailed to the appropriate IRS address found under "**If you filed an individual return and lived in**" on page 2 of the 4506T-EZ or it can be faxed to **(559) 456-5876**. You can expect your transcript to be sent within 5 to 10 days from the time the IRS receives your signed request.

OR

- If your parents need information from other IRS forms, such as Form W-2 or Form 1099, you can use the Request for Transcript of Tax Return (Form 4506-T). Go to the IRS website at http://www.irs.gov/pub/irs-pdf/f4506t.pdf and complete the form. For question #9 your parents should enter "2012". Be sure a parent signs the bottom of the page where it says "Sign Here". The form must be printed and mailed to the appropriate IRS address found under "**Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1010)**" on page 2 of the 4506-T or it can be faxed to **(559) 456-5876**. You can expect your transcript to be sent within 5 to 10 days from the time the IRS receives your signed request.

OR

- Call the IRS at **(800) 908-9946** and have your parents order a Transcript of Tax Return for 2012.