

## How to submit your 2015 tax information to us:

*\*The IRS Data Retrieval Tool (DRT) will be out of service for several months. The Department of Education is advising that students and families plan for the tool to be offline until the start of the next FAFSA (2018-2019) season which will start October 1, 2017.*

### Obtaining a Tax Return Transcript

Tax filers can request a return transcript, **free of charge**, of their 2015 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).
- In the Tools section of the homepage, click “Order a Tax Return or Account Transcript”.
- Click “Order a Transcript” under 3 – Go get your 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. If you are having trouble matching your address, go to [www.usps.gov](http://www.usps.gov), use the Zip Code option and use the “standard” address that the USPS has on file. IRS uses the same address as USPS.
  - Married Filing Jointly-If you filed jointly with your spouse, tax data is listed under the social security number of the primary taxpayer shown on your tax return.
- Click “Continue”
- In the Type of Transcript field, select “Return Transcript” and in the Tax Year field select “2015”.
- 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 doesn’t find a match, use the address listed on the USPS website listed above.
- Select Option 2 to request an IRS “Tax Return Transcript”, and then enter “2015”.
- 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.

#### Telephone Request (representative for faxed tax transcript)

- Call the IRS at customer service number 1-800-829-1040. Assistance is available between the hours of 7:00 am and 7:00 pm (local time).

- Follow the prompts as listed above for Tax Return Transcript for the year “2015”. Then Stay on the line to talk to an IRS Representative. Ask the customer service representative to fax you a copy of your tax return transcript.  
In most cases, you will need to be at the fax machine to assure that your sensitive information is kept private and secure. You may need to stay on the line to confirm receipt of the faxed tax transcript and the number of pages received.

## Paper Request Form - IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Transcript
- Download the IRS Form 4506T-EZ at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1-4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS
  - Transcripts should only be sent directly to the PSU Office of Student Financial Assistance (OSFA) if the transcript is for the student or if the student is claimed as a dependent on the tax return. The OSFA cannot identify transcripts if the student is not listed on the form.
- On line 6, enter “2015” to receive IRS tax information for the 2015 tax year that is required for the 2017-2018 FAFSA.
- Sign and date the form and enter a 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 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing Form 4506T-EZ means 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.

## Local IRS Offices

- You may be able to obtain a **Tax Return Transcript**
- Services are available **BY APPOINTMENT ONLY** at local IRS Offices. Please call **1-844-545-5640** to schedule an appointment.
- For Additional Information about local IRS Offices not listed below go to <http://www.irs.gov/uac/Contact-Your-Local-IRS-Office-1>
- Photo ID is required

Local IRS Offices closest to PSU:

CITY	Street Address	Days/Hours of Service
Joplin	402 S. Main St., Ste. 501 (US Bank Building) Joplin, MO 64801	Monday-Friday 9:00 a.m. - 4:30p.m. (Closed for lunch 12:00 - 1:00 p.m.) (Must make an appointment)
Overland Park	6717 Shawnee Mission Parkway Overland Park, KS 66202	Monday-Friday 8:30 a.m. - 4:30 p.m.
Topeka	120 S.E. Sixth Ave Topeka, KS 66603	Monday-Friday 8:30 a.m. - 4:30 p.m.
Wichita	555 N. Woodlawn Bldg 4 Wichita, KS 67208	Monday-Friday 8:30 a.m. - 4:30 p.m. (Closed for lunch 12:30 -1:30 p.m.)
Fayetteville	655 E. Millsap Road Fayetteville, AR 72703	Monday-Friday 8:30 a.m. - 4:30 p.m.
Tulsa	8321 E 61 <sup>st</sup> St. Ste 120 Tulsa, OK 74133	Monday-Friday 8:30 a.m. - 4:30 p.m.

**OFFICE OF STUDENT FINANCIAL ASSISTANCE**

103 Horace Mann  
1701 South Broadway Street  
Pittsburg, KS 66762-7534

**PHONE:** (620) 235-4240

OR

(800) 854-7488

**FAX:** (620) 235-4078

**WEBSITE:** [http://www.pittstate.edu/office/financial\\_aid/](http://www.pittstate.edu/office/financial_aid/)