



Kean University
Office of Financial Aid
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Instructions on Obtaining 2017 IRS Tax Return Transcript for 2019-2020

Per the U.S. Department of Education, students selected for Verification must submit proof of their and/or their parents' taxable income from the Internal Revenue Service before Federal Student Aid eligibility can be determined. The **IRS Tax Return Transcript** can be obtained by using one of the following options:

Option 1 – Transfer 2017 tax information directly from the IRS database onto your 2019-2020 FAFSA (fafsa.gov) for you and/or your parent(s) through the **IRS Data Retrieval Tool** process.

- If you did not use the IRS DRT on your original FAFSA, you can correct the FAFSA and then transfer data from the IRS.
- If you used the IRS DRT and then made changes to any already-verified item, then you will void the process. Before making such changes, contact the Office of Financial Aid.
- **Option 2** – Obtain a PDF version of the 2017 Tax Return Transcript Letter from the IRS website (www.irs.gov/transcript). Click “Get Transcript Online;” after completing the registration process* (or logging in if a returning user), select “Higher Education/Student Aid” as the reason you need a transcript, and then click **2017** under “Return Transcript” (tax filers) to view the document. Print and/or save the document, and submit all pages to the Office of Financial Aid. **You must write the student’s name and Kean ID# at the top of each page, since Social Security Numbers on IRS transcripts are redacted.** Mailed IRS documents may be *double-sided*, so be sure to transmit both sides if faxing.

*For security purposes, first-time users will need the following to register:

- your social security number, date of birth, filing status, and mailing address;
- access to your email account;
- a mobile phone with your name on the account;
- a personal account # from credit card, mortgage, home equity loan, home equity line of credit, or car loan. Individuals who do not have one of these accounts must use the option below.
- **Option 3** – Request a copy of the 2017 Tax Return Transcript(s) by calling 1-800-908-9946 or by requesting a copy be mailed to you through the IRS website at www.irs.gov/transcript. (Click *Get Transcript by Mail*.) Do NOT instruct the IRS to send the documents directly to Kean University. Upon receipt, submit copies of all pages to the Office of Financial Aid. **You must write the student’s name and Kean ID# at the top of each page, since Social Security Numbers on IRS transcripts are redacted.** Mailed IRS documents may be *double-sided*, so be sure to transmit both sides if faxing.

Also note the following:

- Student or parent tax filers who *amended* their 2017 tax return must submit copies of the IRS Tax Return Transcript (as instructed above) *and* a signed copy of the Amended Tax Return (IRS Form 1040X).
- Students or parents who filed a 2017 tax return from a foreign country or a U.S. Territory (such as Puerto Rico) must submit a copy of the appropriate tax return.
- Tax filers who were victims of identity theft must request a **Tax Return DataBase View (TRDBV)** from the IRS Identity Protection Specialized Unit (IPSU) at 800-908-4490. Submit a copy of the TRDBV *and* a signed statement that you were the victim of tax-related identity theft and that the IRS is aware of this.

Once all documents are received by this office, it will take additional processing time to review and – if necessary - update information. In most cases, your awards cannot be finalized until all required documents are received and processed. If you have any questions, please contact the Office of Financial Aid.