



Kean University
Office of Financial Aid
1000 Morris Avenue
Union, NJ 07083
908-737-3190

Instructions on Obtaining 2016 IRS Tax Return Transcript

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 2016 tax information directly from the IRS database onto your 2018-2019 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 2016 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 2016 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, with your name and Kean ID # printed at the top of **all pages**.

*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 2016 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 with your name and Kean ID # printed at the top of **all pages**. If you fax the document (908-737-3200), note that mailed IRS documents may be *double-sided*, so be sure to fax both sides.

Also note the following:

- Students or parent tax filers who *amended* their 2016 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 2016 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.