



John A. Logan College
Financial Aid Office
700 Logan College Drive
Carterville, IL 62918
Phone 618-985-3741 Fax 618-985-4116 or 618-985-9751

2020-2021
Instructions for 2018
Federal Income Tax Transcript Form

Instructions for 2018 Federal Tax Transcript

Your FAFSA application has been chosen for verification. As a result, you must make a correction to your 2020-2021 FAFSA. You will need to use the IRS Retrieval Option to download your federal tax information into the FAFSA application.

If you are unable to make a correction to your FAFSA, you must submit a copy of your (and your spouse's) or your parent(s) 2018 IRS Federal Tax Transcript and W-2's to the Financial Aid Office. You need to **provide** a copy of the tax transcript that our office can keep.

➤ **You must include your name and student ID on all tax transcripts submitted to financial aid office**

FEDERAL REGULATIONS REQUIRE THE FINANCIAL AID OFFICE TO HAVE AN IRS FEDERAL TAX TRANSCRIPT TO COMPLETE YOUR FINANCIAL AID FILE.

IRS Data Retrieval Tool Instructions on Student's FAFSA

1. 1) Go to www.fafsa.gov.
- 2) Click on Start Here.
- 3) Enter student information and PIN number as requested.
- 4) Select Make Correction to FAFSA.
- 5) Click on Financial Information tab.
- 6) Change drop down box from Will File to Already Completed.
- 7) Enter Student or Parent PIN and click on Link to IRS.
- 8) The next screen will inform you that you are leaving *FAFSA on the Web*. Click OK to continue.
- 9) The IRS.gov screen will appear next. Enter information requested and click on Submit.
- 10) Once the IRS has validated your identification, your 2018 Federal Income Tax Information will appear on the screen. Click on box under "Transfer My Tax Information into the FAFSA." Then click on Transfer Now button.
- 11) Follow instructions to return to *FAFSA on the Web* to complete FAFSA.
- 12) To complete, you must enter your pin number(s) and click submit. You will receive a confirmation upon submission.

IRS Tax Return Transcript Request Instructions

2. Online Instructions

- 1) Go to www.irs.gov.
- 2) Choose "Get My Tax Record" from the homepage.
- 3) Click on the "Get Transcript by MAIL" or "Get Transcript Online" option.
- 4) Complete the online form (all information should be entered exactly as submitted on the tax return).
- 5) Once complete, click continue.
- 6) You will be sent to the Get Transcript page.
- 7) Choose "Tax Return Transcript" and year (2018). ***DO NOT** choose "Tax Account Transcript."
- 8) Once successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript within 5 to 10 days.
 - IRS Return Transcripts requested online cannot be sent directly to the school or any other third party by the IRS
 - Once received, please mail, fax, or bring in a copy of your IRS Tax Return Transcript.
 - **You must include your name and student ID on all tax transcripts submitted to financial aid office**

When your original return shows a ...	and you filed <i>electronically</i> , then	and you filed on <i>paper</i> , then
refund amount or no balance due,	allow 2-3 weeks after return submission before you request a transcript.	allow 6-8 weeks after you mailed your return before you request a transcript.
balance due and you paid in full with your return,	allow 2-3 weeks after return submission before you request a transcript.	we process your return in June and you can request a transcript in mid to late June.
balance due and you paid in full after submitting the return,	allow 3-4 weeks after full payment before you request a transcript.	Note: we process all payments upon receipt.
balance due and you didn't pay in full,	we process your return in mid-May and you can request a transcript by late May.	

3. Telephone Request Instructions

- 1) Call the IRS at 1-800-908-9946.
- 2) Tax filers must follow prompts to enter information.
 - (All information should be entered exactly as submitted on tax return)
 - Use the Name and Social Security Number of person listed 1st on tax return
- 3) Select “Option 2” to request an IRS Return Transcript and then enter “2018.”
- 4) Once successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript within 5 to 10 days. IRS Return Transcripts requested online cannot be sent directly to the school or any other third party by the IRS.
- 5) Once received, please mail, fax, or bring in a copy of your IRS Tax Return Transcript.

You must include your name and student ID on all tax transcripts submitted to financial aid office

4. Mail-in Form 4506-T (Request for Tax Transcript)

- 1) Go to www.irs.gov.
- 2) Do a search for form 4506-T.
- 3) Print.
- 4) Fill out sections 1-5.

*Only fill in section 5a-5b if you would like your Tax Return Transcript to be mailed directly to us. If so, it should be mailed to the exact address below.

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➤ **Section 5b-customer file number needs to be your student ID, if you are requesting a parent transcript, use your student ID as customer number.**

- 5) Select #6. Write the type of return you filed (1040 etc.). Check option 6A for Tax Return Transcript.
- 6) Fill in section 9. Enter the date of 12/31/2018 for your 2018 Tax Return Transcript.
- 7) Once the form is completed, signed, and dated please mail to the appropriate address listed under General Instructions *Chart for individual transcripts on page 2.
- 8) Once received, please mail, fax, or bring in a copy of your IRS Tax Return Transcript.

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