

## 2023-2024 FAFSA Tax Return/Tax Transcript Instruction Sheet

If taxes are requested by the Office of Scholarships and Financial Aid, you have multiple options of how to provide this information. To be eligible for Federal and State aid programs, requested documentation must be submitted to the Office of Scholarships and Financial Aid prior to your last date of attendance for the academic year (2023-2024). W-2's may also be requested and should be provided in addition to these tax documents.

### Tax Documentation Options: One of the following:

- **SIGNED 2021** Federal Tax Return (1040)
- Use the **IRS Data Retrieval Tool** within the FAFSA
- **2021** Federal Tax Return Transcript (IRS)

### INSTRUCTIONS

#### Linking via the IRS Data Retrieval Tool

Log in to your FAFSA by going to [studentaid.gov](http://studentaid.gov)

- Under the “student” and/or “Parent” financial section, click “Transfer my data from the IRS”
- Repeat the process for parent/student if taxes are requested for both parties
- Re-sign and submit the FAFSA
- Confirmation will be sent to the school within one week.

#### Requesting Federal Tax Return Transcripts

##### Online Requests

You can use the Download or Mail options below only if you already have a login account with the IRS.

- Go to: [www.irs.gov](http://www.irs.gov)
- Click **Get Your Tax Record**

##### Download

- Click **Get Transcript Online**
- Enter your user name that was created previously (you must have an account to use this method)
- Click “Continue”
- Select **Tax Return Transcript** and in the Tax Year field, select **2021**
- If successfully validated, you will be able to view/download your **2021** Tax Return Transcript
- If you are unable to or don't have accounts in your name that meet the requirements, you can select having the transcript mailed to you

##### By Mail

- Click **Get Transcript by Mail**
- Enter Social Security Number, date of birth, street address, and zip or postal code
- Click “Continue”
- Select **Tax Return Transcript** and in the Tax Year field, select **2021**
- If successfully validated, you can anticipate receiving **2021** Tax Return transcripts within 10 days.

##### Other options

- Phone: Call the IRS at **1-800-908-9946**
- Paper Form: Complete **IRS form 4506-T**—do NOT request the form to be sent directly to Parkside

IMPORTANT NOTE: The verification process can take up to four weeks to complete during peak times of year. Paperwork received within four weeks of the start of the semester may result in late fees due to unpaid tuition. It is in your best interest to submit your paperwork as early as possible.

**Submit to: OFFICE OF SCHOLARSHIPS & FINANCIAL AID, 900 Wood Road, Kenosha, WI 53141**  
Fax: 262-595-2216 Email: [finaid@uwp.edu](mailto:finaid@uwp.edu)