

## **INSTRUCTIONS FOR OBTAINING FEDERAL TAX ACCOUNT TRANSCRIPTS FROM THE IRS**

1. Order a federal tax transcript [online](http://www.irs.gov/individuals/article/0,,id=232168,00.html?portlet=105) at the IRS website at:  
<http://www.irs.gov/individuals/article/0,,id=232168,00.html?portlet=105>
  - A. Click on the "Order a Tax Transcript" hyperlink under step 3 "Go get your transcript"
  - B. Click "OK" in the message box pop-up to authorize usage
  - C. Enter the tax payer social security number (or ITIN)
  - D. Select the day, month and year of tax payers birth from the respective drop down boxes
  - E. Enter the tax payers street address
  - F. Enter the tax payers zip code or postal code
  - G. Select "Return Transcript" from the drop down box
  - H. Select the correct tax year from the drop down box

A confirmation page will tell you to allow 5-10 days to receive the transcript in your mail. Click "Exit".

### **OR**

2. Call the IRS at **1-800-908-9946** and request a transcript by the automated system. The tax payer can request up to 10 copies of tax transcripts by following the instructions.

After selecting options identifying yourself to the IRS you should choose **OPTION 4**

OPTION 4 is for **both** a tax transcript *and* a tax account transcript

There is **no fee** for OPTION 4.

It will take 5 to 10 days for the forms to arrive in your mail.

You should then forward the original document to the WCU Financial Aid Office. Please make sure all pages are legible and that no pages are missing.

One copy for both the student and the custodial parent(s) if dependent