

IRS Consent and Approval

As part of federal student aid eligibility, students, spouses (as appropriate), and parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse or parent and parent spouse filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

Instructions for obtaining a Tax Return Transcript

ONLINE REQUEST

1. Go to www.irs.gov IRS website
2. Click on "Get Your Tax Record"
3. Select either "Get Transcript Online" or "Get Transcript by Mail" (by mail will take 5 to 10 business days)
 - a. ONLINE IS PREFERRED FOR QUICK TURNAROUND TIME, if eligible
 - b. You will have to create an account if you do not already have one.
You will need an account number for one of the following financial accounts – credit card, mortgage, home equity loan, home equity line of credit, or auto loan.
4. Enter name (first person listed on tax return) and address information exactly as it appears on your most recent federal tax return.
5. Select the reason for requesting a transcript as "Higher Education/Financial Aid", select a **"TAX RETURN TRANSCRIPT"** and select the appropriate tax year (two years prior to the academic year). *Examples: academic year 2022-2023, select tax year 2020; academic year 2023-2024, select tax year 2021*
6. Save the PDF and/or print a copy

PHONE REQUEST

1. Call the IRS at 1 800-908-9946
2. Follow Prompts to enter tax filer's SSN and Street Address (the one currently on file with IRS)
3. Select the option to request an IRS "Tax Return Transcript"

PAPER REQUEST (IRS Form 4506T-EZ)

1. Download form at www.irs.gov IRS website
2. Complete lines 1-4 (follow instructions on page 2 of the 4506T)
3. Please do not request the transcript be sent directly to the school

IMPORTANT: Upon receipt of the Tax Return Transcript, submit a complete copy to Stonehill College (keep a copy for your records). **It is imperative that the student name and Stonehill ID be clearly printed on the top of the transcript.** Part of the ss#, name, and address are masked for security purposes on the transcript; therefore, without the student name and Stonehill ID printed on the transcript we will not be able to attach the transcript to the student record.

Preferred method of submission of the document is in PDF format to finaid@stonehill.edu (enter student name and Stonehill ID in subject line) or mail to Student Financial Assistance, Stonehill College, 320 Washington Street, Easton, MA 02357.