Tax Return Transcript Instructions 2027-2028

Revised: 11/3/26

What is a Tax Return Transcript?

The government selects some FAFSA's for a process called Verification. In this process, we are required to compare information from your FAFSA with your actual tax return. You can turn in a copy of your **hand signed 2025** IRS 1040 tax return. If a copy of your 1040 is not available, then you must obtain a Tax Return Transcript from the IRS. Below are instructions on how to provide a Tax Return Transcript.

What do I have to provide so my FAFSA can be verified?

- **MOST students** have to complete a Verification Worksheet. The 2027-2028 Verification Worksheet is available on our Forms page at www.nelson.edu/financialaid. You may also email us at financialaid@nelson.edu to request that a Verification Worksheet be sent to you.
- **DEPENDENT students** typically must provide income information from your and your parents' 2025 taxes. (See section below entitled "How can I provide my 2025 tax information?")
- **INDEPENDENT students** typically must provide income information from your and your spouse's 2025 taxes. (See section below entitled "How can I provide my 2025 tax information?")
- As required, the Financial Aid Office may ask you to submit other documentation.

How can I provide my 2025 tax information?

If you are unable to provide a hand signed 2025 IRS 1040 tax return, then there are only two other acceptable methods to provide the required tax information.

Option #1 (Preferred Method)—FAFSA Direct Data Exchange (DDX) of Federal Tax Information (FTI): When completing the income sections of the FAFSA, the student/parent is given the option to authorize for their tax information to be directly imported from the IRS into the FAFSA. If a student/parent gives consent, they will not have to provide any additional information from their taxes. In order to use the DDX process, the student/parent must have a 2024 tax return on file with the IRS.

Option #2—Request a Tax Return Transcript from the IRS: Students that are unable to use the DDX process to import tax data into their FAFSA must contact the IRS directly to request a "2024 Tax Return Transcript." ***(See instructions below.)***

How to Request a 2024 IRS Tax Return Transcript:

- **ONLINE:** Students may order a Tax Return Transcript Online at http://www.irs.gov/Individuals/Order-a-Transcript. You have the option get your transcript online or get it by mail. Please choose the online option as you will be able to receive an electronic version of your IRS Tax Return Transcript immediately after creating an account. Dependent students should make sure to request a Tax Transcript for both the student and their parents. **If the online option does not work, then you can request that a paper tax return transcript be mailed to you.**
- **PHONE:** Call 800-908-9946 to order a 2024 tax return transcript through the IRS automated service.
- **IRS FORM 4506-T:** Students may order a Tax Return Transcript by completing Form 4506-T which is available online at http://www.irs.gov/pub/irs-pdf/f4506t.pdf.

You can submit an IRS Tax Return Transcript, Verification Worksheet, and any other required documents via:
Mail: Nelson University, Attn: Financial Aid, 1200 Sycamore St, Waxahachie, TX 75165, **Fax:** (682)224-8644, **Email:** financialaid@nelson.edu