

## VERIFICATION INSTRUCTIONS

Occidental College - Office of Financial Aid - 1600 Campus Road F-35 - Los Angeles, CA 90041  
323.259.2548 (phone) - 323.341.4961 (fax) - finaid@oxy.edu - www.oxy.edu/financial-aid

The federal government selects approximately 30% of our student population for verification, which requires families to submit additional information to our office.

### Verification Requirements:

- Verification Worksheet - Dependent Student or Verification Worksheet - Independent Student
- Parent(s): IRS Tax Return Transcript or Data Retrieval; IRS Verification of Non-Filing Letter (if applicable)
- Student: IRS Tax Return Transcript or Data Retrieval

### Deadlines:

These verification requirements are due by **July 1, 2022**. Although we will be able to issue a tentative financial aid award without these requirements, the student's awards will not be official until we receive this documentation. Without these documents, we will not be able to post financial aid to the student's account in time for the first bill of the fall semester. If these requirements are not submitted, your financial aid will be placed in an inactive status and may be cancelled. For more details, please visit our website at <https://www.oxy.edu/financial-aid/forms/verification-requirements>.

### ONLINE REQUEST

If you use the online request, you will immediately receive your **IRS Tax Return Transcript**.

1. Go to the IRS website ([www.irs.gov](http://www.irs.gov))
2. Click the "File" tab
3. Click "Get Your Tax Record"
4. Click "Get Transcript Online"
5. Log-in or Create a Login
6. If creating a login— Click the "Get Started" icon
7. Follow steps 1-6 to set-up your account and request your transcript
8. Step 1- enter personal information (first name, last name, e-mail address)
9. Step 2- retrieve Confirmation Code that was sent to your e-mail address— enter confirmation code and click "Verify e-mail confirmation code"
10. Step 3- enter personal information (social security number, date of birth, filing status, address)— select the option to "Create a User ID and password" or "Proceed as Guest"— click "Continue"
11. Step 4 - answer security questions— click "Continue"
12. Step 5- Select reason for requesting a transcript— select "Higher Education/Student Aid"— click "Go"— under "Return Transcript" select **2020** for the year
13. Step 6- If successful, your **2020 IRS Tax Return Transcript** should have opened in a new window— if not, double check that your pop-up blocker is off
14. Save your transcript to your desktop

### PHONE REQUEST

If you request your **IRS Tax Return Transcript** by phone, it will be mailed to the address listed on your tax return within 5-10 business days.

1. To request an **IRS Tax Return Transcript** or **Tax Account Transcript** by phone call 1-800-908-9946.
2. Follow the prompts and enter your personal information.
3. For a **Tax Return Transcript** press option 2, for a **Tax Account Transcript** press option 1

### PAPER REQUEST

You can complete Form 4506-T and mail or fax your request for an **IRS Tax Return Transcript**. After the IRS receives your request, it can take 5-10 business days for your transcript or non-filing letter to be mailed to the address you list on your form.

1. Go to the IRS website ([www.irs.gov](http://www.irs.gov))
2. Click the "Forms & Instructions" tab
3. Find & download Form 4506-T
4. Answer questions 1-5
5. To request an **IRS Tax Return Transcript** check box 6a
6. Mail or fax this form to your state's IRS office (see page 2 of the 4506-T form for addresses and fax numbers)