



Colgate University

Requesting a Tax Return Transcript

Please note: If listed on your portal, this federal requirement must be satisfied before your financial aid eligibility can be finalized. If you have questions about this requirement, please contact the Office of Financial Aid at finaid@colgate.edu.

If you are asked to submit a tax return transcript, please be aware:

1. Even if you've already submitted the relevant year's tax return, a tax return transcript may still be required of you.
2. In lieu of the transcript, you may submit a correction to your [FAFSA](#) (Free Application for Financial Aid) and select to use the IRS Data Retrieval Tool (DRT), *if* you are eligible to do so.

If DRT is not an option, you may request a tax return transcript, free of charge, by following the instructions noted below:

Online Request – no wait to receive results; must register to use the service

- Visit <https://www.irs.gov/individuals/get-transcript>.
- Make note of the requirements listed under the heading "What You Need."
- Click on the "Get Transcript Online" button, and follow remaining instructions on the site.

Mail Request – 5-10-day wait to receive results; need not register to use the service

- Visit <https://www.irs.gov/individuals/get-transcript>.
- Make note of the requirements listed under the heading "What You Need."
- Click on the "Get Transcript by Mail" button, and follow remaining instructions on the site.

Submission to the Financial Aid Office

If your financial aid application is selected for verification, you will be given access to the College Board IDOC [portal](#) to upload the required documents electronically. Any required forms will be made available for you within your IDOC portal.

You will receive an e-mail from the College Board once access to the portal is available. We can only accept documentation submitted via the IDOC portal. We cannot accept documents submitted via e-mail, fax, or mail.