**Tax Form Request Quick Reference**

If you are being asked to submit a tax return, amended tax return, or a W2 and do not have access to one (or more) of those documents, please see below for proper substitutions.

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| --- | --- |
| **Requested** | **Acceptable Substitute** |
| 1040 | Tax Return Transcript**OR**IRS DRT Transfer**OR**Record of Account Transcript |
| 1040-X | Tax Account Transcript **AND** 1040 *OR* Tax Return Transcript *OR* IRS DRT Transfer**OR**Record of Account Transcript |
| W-2s and 1099s | Wage and Income Transcript |

**FAQs**

**Q:** What if the student or parent says that they did not file an amended return?

**A**: The 07 flag shows whenever the taxpayer files an amended return OR the IRS makes an internal change of which they always inform the taxpayer by mailed notice. Regardless of why the flag shows up, the student or parent must submit documentation to resolve the issue.

**Q:** What are the differences between transcripts?

**A:** A Tax Return Transcript shows information as reported on the original 1040. The Tax Account Transcript only shows most current financial information. A Record of Account Transcript includes both original and amended information.

**Q:** What documents are preferred?

**A:** In order: Tax Forms > Return and Account Transcripts > Record of Account Transcript.