Use these instructions if you have been notified via your email or Web4U that you have an outstanding requirement requesting specific IRS tax data for you, your spouse, and/or your parents.

**Tax Return Documentation Instructions**

**Option 1: IRS Tax Return Documents**

Provide an IRS Form 1040 Tax Return for the correct tax year with a **handwritten signature** in the "Sign Here" section (or the "Paid Preparer Use Only" section fully completed), AND schedules 1, 2, and 3 (if filed with the tax return). The IRS Form 8879 cannot be accepted in place of a handwritten signature on the IRS Form 1040 Tax Return.

**Important note!**

If you are required to submit an **IRS Tax Return Transcript**, an IRS Form 1040 Tax Return cannot be accepted, and you will need to follow the **Option 2: Tax Return Transcript** instructions.

**Option 2: IRS Tax Return Transcript**

Provide an IRS Tax Return Transcript for the correct tax year. To order this transcript online:

1. Go to [IRS.gov](https://www.irs.gov)
2. Select **Get your tax record**
3. Select **Get transcript online** or **Get transcript by mail**

If you are not able to order online, you can also:

- Call 800.908.9946 to order by phone
- Complete IRS form **4506-T** and fax or mail it to the IRS

**Important note!**

Ensure that you order the IRS Tax Return Transcript. IRS Tax Account Transcripts cannot be accepted.

**W-2 Documentation Instructions**

**Option 1: IRS Form W-2**

Provide all IRS Form W-2s for the correct tax year.

**Important note!**

If you submit an IRS Form W-2c Corrected Wage and Tax Statement, you must also submit the original IRS Form W-2 that was corrected.

**Option 2: IRS Wage and Income Transcript**

Provide an IRS Wage and Income Transcript for the correct tax year. To order this transcript online:

1. Go to [IRS.gov](https://www.irs.gov)
2. Select **Get your tax record**
3. Select **Get transcript online** or **Get transcript by mail**

If you are not able to order online, you can also:

- Call 800.908.9946 to order by phone
- Complete IRS form **4506-T** and fax or mail it to the IRS