

Instructions for Using IRS Data Retrieval Tool or Obtaining IRS Tax Return Transcript

For Tax Return Filers

If you were selected for verification and are required to provide income tax information, you must provide this information directly from the IRS. The two methods for doing this are: **(1) IRS Data Retrieval Tool or (2) Tax Return Transcript**. The IRS Data Retrieval Tool is recommended (if you are able to use it). To use this method you must allow for processing periods, depending on how you submitted your information to the IRS.

- For electronically filed tax returns you must wait 2-3 weeks after filing before your data will be available using the IRS Data Retrieval Tool.
- For tax returns filed by paper you must wait approximately 8-11 weeks after filing before your data will be available using the IRS Data Retrieval Tool.

IRS Data Retrieval Tool (through FAFSA)

Submitting your FAFSA using the IRS Data Retrieval Tool allows you to transfer information directly from the IRS to your FAFSA and verify income. We strongly encourage you to select this option when you first file your FAFSA; after the IRS has your tax return; or, when subsequent corrections are made to your FAFSA.

If you did not use the data retrieval tool on your original FAFSA, follow these steps:

1. Log into student's FAFSA at www.fafsa.gov
2. Select "Make FAFSA Corrections"
3. Go to the "Financial Information" section of the form
4. Click "LINK TO IRS" (for eligible students and parents)
5. If eligible to use the tool, you will be transferred to the IRS website. Click OK.
6. On the IRS website, you will be prompted to enter information as it appears on your tax return. (It is important you complete this section exactly as it appears on your tax return or your information may not match with IRS records and the data retrieval may not go through.)
7. Once the IRS has authenticated your identity, your IRS tax information will display. Check the box to "Transfer My Tax Information into the FAFSA."
8. After you have transferred your data, you will be returned to the FAFSA website to finish your application. Make sure not to change any of the financial data that was imported from the IRS website. Remember that both you and your parents (if applicable) will need to go through a separate authentication process when filling out the Financial Information sections of the FAFSA.
9. To submit your updated FAFSA containing your/your parent's IRS data information you must complete "Sign and Submit" portion and click on "SUBMIT MY FAFSA NOW."

**IMPORTANT REMINDER: Please order a "Tax Return Transcript"
NOT an "Account Transcript"**


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Tax Return Transcript

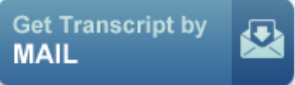
If you are unable to use the IRS Data Retrieval Tool you must submit a Tax Return Transcript from the IRS. You may request online, by telephone, mail, or fax.

Option A: Online Requests – E-mail address is required

1. Go to the IRS website at www.irs.gov
2. Go to: Tools and select “Get Transcript of Your Tax Records”
3. Sign up to create or reactive an IRS account
 - a. An email address is required and you will



- View and print your transcript immediately.
- Choose among [Tax Return](#), [Tax Account](#), [Record of Account](#), or [Wage and Income](#) transcripts or a [Verification of Nonfiling Letter](#).
- Need help? [More information about Get Transcript Online](#).



- Transcripts arrive in 5 to 10 calendar days.
- Choose from either a [Tax Return](#) or [Tax Account](#).
- Transcript by Mail is available [en Español](#).

Option B: Telephone Requests

1. Call the IRS at 1-800-908-9946 (on the automated menu)
2. Enter and verify your Social Security Number
3. Enter in your street address number
4. Select Option #2 Tax Return Transcript (arrive in 5-10 days)
5. Enter and verify the year of your needed Tax Return Transcript
(For 2013-14 verification, request 2012 tax year. For 2014-15 verification, request 2013 year)

Option C: Mail and Fax Requests

1. Print and complete 4506-T form at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>
2. To request a Tax Return Transcript check box 6a
3. Mail or fax to the address/phone number indicated on the form

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