



# 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 detailed below. The first method 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 weeks after filing before your data will be available using the IRS Data Retrieval Tool.**

**IRS Data Retrieval Tool** – 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, you can make a correction**
  1. Log into student's FAFSA at [www.FAFSA.gov](http://www.FAFSA.gov)
  2. Select "Make FAFSA Corrections,"
  3. Go to the "Financial Information" section of the form
  4. For the question "Have you completed the IRS income tax return" select "Already Completed"
  5. Answer the 3-5 questions listed. *Depending on how you answer each question, you may or may not be eligible to use the Data Retrieval Tool.*
  6. Click "LINK TO IRS" (for eligible students and parents)
  7. If eligible to use the tool, you will be transferred to the IRS website. Click OK.
  8. 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.)
  9. Once the IRS has authenticated your identity, your IRS tax information will display. Check the box to "Transfer My Tax Information into the FAFSA"
  10. Click the "Transfer Now" button
  11. 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.
  12. 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."

**Tax Return Transcript** – If you are unable to use the IRS Data Retrieval Tool you must submit a **Tax Return Transcript** from the IRS to our office. Most requests are processed with 10 business days. To request:

- A. You may request a **Tax Return Transcript** online through the IRS website by going to: [www.irs.gov](http://www.irs.gov)
  - Go to: Tools and click on "Get Transcript of Your Tax Records"
  - Choose either "Get Transcript ONLINE" or "Get Transcripts by MAIL"
  - Complete the required information and a **Tax Return Transcript** will be ordered.
- B. Call the IRS at 1-800-908-9946 (on the automated menu):
  - a. Enter and verify your Social Security Number
  - b. Enter in your street address number
  - c. Select Option #2 to request a **Tax Return Transcript**
  - d. Enter and verify the year of your needed **Tax Return Transcript** (for a 2014-15 verification, request the 2013 tax year)
- C. You may complete Form 4506T: Request for **Transcript of Tax Return**, and mail it or fax it to the address/phone number indicated on the form. To request a **Tax Return Transcript** check box 6a. Requesting a **Tax Return Transcript** is free of charge. You can print this form at: <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>

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