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 Your Tax Record"
3. Sign up to create or reactive an IRS account

Request Online

What You Need

To register and use this service, you need:

- your SSN, date of birth, filing status and mailing address from latest tax return,
- access to your email account,
- your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- a mobile phone with your name on the account.

What You Get

- All transcript types are available online
- View, print or download your transcript
- Username and password to return later

Get Transcript Online

Request by Mail

What You Need

To use this service, you need your:

- SSN or Individual Tax Identification Number (ITIN),
- date of birth, and
- mailing address from your latest tax return

What You Get

- Return or Account transcript types delivered by mail
- Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you

Get Transcript by Mail

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 2018-19 verification, request 2016 tax year. For 2019-20 verification, request 2017 tax year)

Option C: Mail and Fax Requests

1. Print and complete 4506-T form at https://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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For Non-Filers

How to request a "Verification of Non-Filing" Letter

Option 1: Request 4506-T Form online, complete the and mail to IRS
1. Go to www.irs.gov, click on the "Forms and Instructions" heading. Scroll down and select *Form 4506-T* (Request for Transcript for Tax Return).
2. On page 1, complete:
    a. Lines 1a through 5
    b. Line 7, check box
    c. Line 9, enter "12/31/2017"
    d. Check box above signature line
    e. Print out form
    f. Sign and date
    g. Send form to IRS. View page 2 for mailing address and /or fax number

Option 2: How to get an IRS Verification of Non-Filing Letter
1. Go to http://www.irs.gov/individuals/get-transcript
2. Click 'Get Transcript Online"
3. If you are a first time user, select 'Create Account'. If you already have an account, enter your user ID under "Log In" section
4. If you are unable to register or you prefer not to use the "get transcript Online" option, you must complete the 4506-T Form.

How to request a "Form W-2 or Wage & Income" Statement

Option 1: Request 4506-T Form online, complete the and mail to IRS
3. Go to www.irs.gov, click on the "Forms and Instructions" heading. Scroll down and select *Form 4506-T* (Request for Transcript for Tax Return).
4. On page 1, complete:
    a. Lines 1a through 5
    b. Line 8, check box
    c. Line 9, enter "12/31/2017"
    d. Check box above signature line
    e. Print out form
    f. Sign and date
    g. Send form to IRS. View page 2 for mailing address and /or fax number

Option 2: How to get W-2 (Wage & Income Transcript)
5. Go to http://www.irs.gov/individuals/get-transcript
6. Click 'Get Transcript Online"
7. If you are a first time user, select 'Create Account'. If you already have an account, enter your user ID under "Log In" section
8. If you are unable to register or you prefer not to use the "get transcript online" option, you must complete the 4506-T Form.