



Office of Student Financial Services

Instructions for Using the IRS Data Retrieval Tool or for Obtaining a Tax Return transcript

If you have been selected for federal verification, the College is required to verify the income and federal tax information that you and your parents reported on your FAFSA. There are three ways for you to provide the information required:

- IRS Data Retrieval Tool
- Tax return transcript, printable in PDF format or paper form sent, using *Get Transcript* online service
- Tax return transcript ordered via a phone call to the IRS

Please note that we cannot award your aid until we have completed the verification of the information on your FAFSA. Tax filers who have filed an amended return, a foreign tax return, or who are filing under a status of "Married filing separately" cannot use the Data Retrieval Tool and will have to request a Tax Return Transcript.

IRS Data Retrieval Tool Process (Data Retrieval Tax Filers Must EACH Complete Data Retrieval)

Your FAFSA

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. To use the Data Retrieval Tool, complete the following steps:

- Go to studentaid.gov and select the "Log In" button
- Log in using your FSA ID
- Select the "Continue" or "Make a Correction" button
- Select the "Financial Information" tab from the top of the page.

Instructions for the parent to request the parent IRS information:

- Go to "Parent Financial Information" page
- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
- If eligible, select which parent is providing information on the FAFSA
- Enter the FSA ID for the parent providing the information
- Click "Link to IRS"
- For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on studentaid.gov, the IRS DRT web page, and on the *Student Aid Report*.

Instructions for the student to request the student IRS information:

- Go to "Student Financial Information" page
- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
- If eligible, click "Link to IRS"
- For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on studentaid.gov, the IRS DRT web page, and on the *Student Aid Report*.
- Proceed to the Sign and Submit page

If you would prefer to order a Tax Return Transcript instead of using the Data Retrieval Tool, see the reverse side.

IRS Tax Return Transcript Request Process

Tax filers can request a transcript of their current tax return, free of charge, from the Internal Revenue Service (IRS) through the *Get Transcript* page on the IRS website. **Addresses provided must exactly match those on your tax return.**

- Go to the IRS Web site at www.irs.gov/transcript.
- The *Get Transcript* page will enable you to request your transcript in one of two ways
 - **ONLINE** – choose this option to view and print your transcript immediately (PDF format); be sure to choose **Tax Return (not account)** as your option. This is the preferred method. Send the copy of your tax return transcript to Student Financial Services.
 - **MAIL** – choose this option if you would like to have your Tax Return Transcript mailed to your address on record; be sure to choose **Tax Return (not account)** as your option. Transcripts arrive in 5 to 10 calendar days and should be sent to Student Financial Services. IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

Phone Request for Tax Return Transcript

- Available from the IRS by calling **1-800-908-9946**.
- Tax filers must follow prompts to enter their social security number and the numbers in their street address (generally this will be numbers in the street address that was listed on the latest tax return filed).
- Select “Option 2” to request an IRS Tax Return Transcript and then enter the appropriate tax return year.