

## How to Use the IRS Data Retrieval Tool

*Note: You can only use the IRS Data Retrieval if you have already filed your taxes. You must allow the IRS at least 3 weeks for processing if you submitted your taxes electronically, or 11 weeks if you submitted your taxes by mail.*

1. Login to your FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
2. If you have already submitted a FAFSA, you will need to click “Make FAFSA Corrections.”
3. Go to the “Financial Information” tab/section of the FAFSA.
4. You will see the question, “For 2015, have you completed your IRS income tax return or another tax return?”
5. After selecting “Already completed” from the first drop down box, continue answering the questions until you see “Based on your response, we recommend that you transfer your information from the IRS into this FAFSA.”
6. Click “Link to the IRS.”
7. You will see a message letting you know that you are leaving FAFSA.gov and you will be transferred to the IRS website. Click “OK.”
8. You will arrive on a page called “Get My Federal Income Tax Information.” Some information on this page is already pre-filled.
9. Enter the remaining address information *EXACTLY* how it was submitted on your federal tax return. It may be helpful to have your tax forms in front of you. ***(i.e. 123 Main Street is different than 123 Main St.)***
10. Click “Submit.” You will see a summary of the information you entered. At the bottom of the page, check the box that says “Transfer My Tax Information to My FAFSA.”
11. After checking the box, click the button that says “Transfer Now” to submit the transfer and return to the FAFSA.
12. Once you have returned to your FAFSA, ***DO NOT*** change any of the information that was transferred over, or else the DRT becomes invalid.
13. You will still be asked to verify your wages for 2015 as well as the balance of any checking or savings accounts, so make sure to fill in those appropriate fields. ***NOTE: If the student is a dependent, the IRS Data Retrieval must be completed for the student and the parent.***
14. Make sure to ***SIGN AND SUBMIT*** your FAFSA once the Data Retrieval is completed. We will receive the update within 3-5 business days.

***\*If you are unable to use the Data Retrieval Tool please see options below.\****

## **How to Request a Paper Tax Return Transcript**

*If you were not able to use the Data Retrieval Tool, you will have to request a Tax Return Transcript.*

### **Requesting a Copy by Phone**

1. Call the IRS at 1-800-829-1040 (7:00am-7:00pm).
2. Follow prompts for the language of choice, Press 2 for “Questions about personal income taxes.”
3. Press 1 for “Questions about a form you already submitted...”
4. Press 2 for “Tax Return Transcript.”
5. Enter the SSN, Address and follow the prompts including the year for “2015.”
6. Continue with the prompts until you have successfully requested the transcript.
7. You will receive a copy within 5-10 business days. Please keep the original and submit a copy to the Financial Aid Office.

### **Requesting Copy to be Mailed:**

1. Visit <http://www.irs.gov>. Under the “Tools” section, select “Get Transcript of you Tax Records.”
2. Choose “Get Transcript by Mail.”
3. Enter your information and the address listed on your taxes, then click “Continue.”
4. Select “Tax Return Transcript” from the first drop-down menu and then select the 2015 tax year.
5. Click “Continue.”
6. You will receive a copy within 5-10 business days. Please keep the original and submit a copy to the Financial Aid Office.