

IRS Tax Transcript Request Process

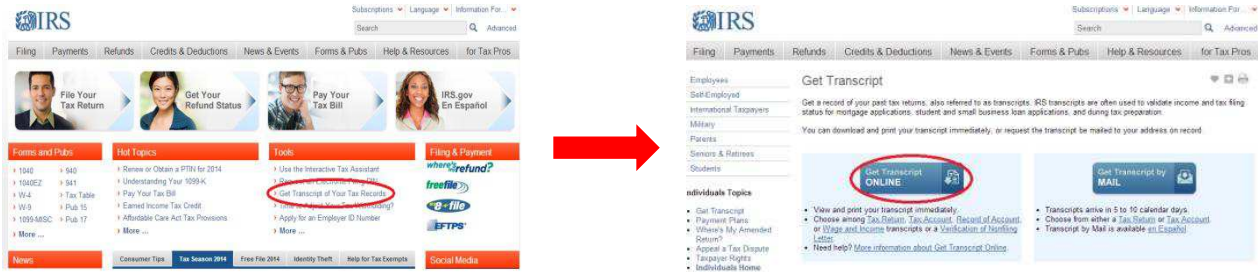
Tax filers can request transcripts, free of charge for their 2013 tax return from the IRS in one of four ways.

1. IRS Data Retrieval Tool (DRT): *Preferred Method*

- See reverse page for step by step instructions.

2. On Demand (Online):

- On www.irs.gov select “Get Transcript of Your Tax Records”, and then select “Get Transcript Online.”



- Create an account and then the IRS will ask for your name and email address. In order to proceed, they will email you a confirmation code that you must enter.
- You will then be prompted for your social security number, date of birth, tax filing status, street address, and zip code.
- You will then be asked a series of questions that apply **ONLY** to the person whose data was entered. These questions are to assist in confirming your identity.
- Once you have passed the security questions, you will be on the page that allows you to choose the type of document you wish to print.
 - Select the reason for the request as “Higher Education/Student Aid”
 - It will then prompt you to select the “Return Transcript” for 2013.
 - You can also choose to print the W-2 detail report (Wage & Income Transcript) that you provided to the IRS.

**Please note that this will only pull the W-2 for the person whose data was entered. If another parent was on the tax return, and you need that person’s W-2, you will have to start over and use that person’s information to log in. The same email address can be used for multiple accounts.*

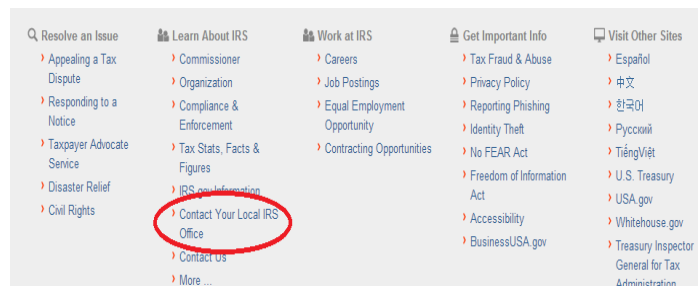
3. Telephone Request:

- Call the IRS directly at 1-800-908-9946.
- Follow prompts to enter your social security number, and street address.
- Select **Option 2** for Tax Return Transcript, and enter year **2013**.

**You should receive a statement of confirmation such as “Please allow 5-10 days to receive it. The transcript will be sent to the address they have on file for you.”*

4. Local IRS Office:

- Contact/Visit your local IRS office.
- On www.irs.gov, select “Contact Your Local IRS Office” in the bottom grey area on the main page.

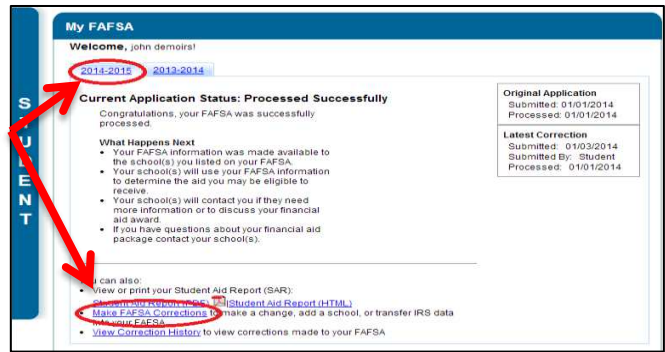
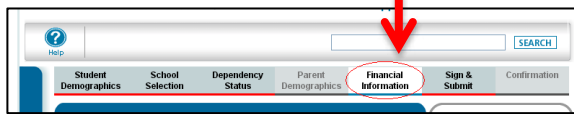


****Once you receive your tax return transcript by using Step 2, 3, or 4; please send it to the Financial Aid Office. ****

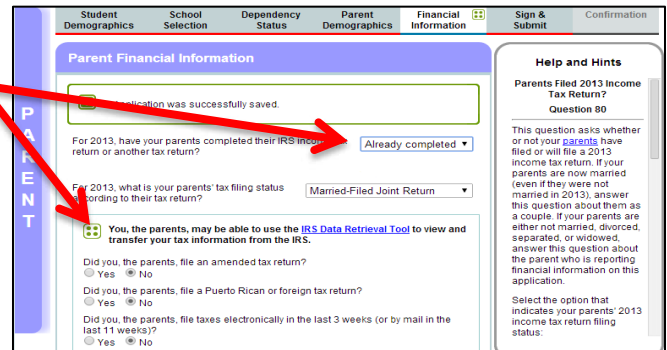
Mail to: One University Place, Murfreesboro, NC 27855 or Fax to: (252)398-6513

Step by Step Instructions for IRS Data Retrieval Tool ---PREFERRED METHOD

- ❑ Go on to the FAFSA website (www.FAFSA.gov). Select to login, enter requested data.
- ❑ On the 2014-15 FAFSA, select "Make FAFSA Corrections."
- ❑ Enter your pin and password.
- ❑ Then select the "Financial Information" tab.



- ❑ After you select "Already Completed" as your filing status, you must be able to answer "No" to the filtering questions regarding amended returns, foreign returns, and filing electronically within the last 3 weeks or by mail within the last 8 weeks.
- ❑ You will then be required to enter the PIN of the person whose tax information you will be transferring.
- ❑ Select "Link to IRS".
- ❑ You will then be notified that you are leaving the FAFSA website, select OK.



- ❑ Once on the IRS website, enter all the information it asks. * ENTER EVERYTHING EXACTLY THE WAY IT IS ON THE TAX RETURN, ESPECIALLY THE ADDRESS.*
- ❑ If the IRS validates your identification, your IRS tax information will be displayed. Select "Transfer My Tax Information Into the FAFSA", then "Submit."
- ❑ **DO NOT STOP YET!**
- ❑ You will then be directed back to the FAFSA website. You must continue through the submission of the correction.
- ❑ Follow the same steps for the student or parent, if needing to link their tax information.

Filing Status	Married-Filed Joint Return	
Type of Tax Return Filed	1040	Question 33 on the FAFSA
Adjusted Gross Income	\$97,750	Question 35 on the FAFSA
Income Earned From Work	\$94,188	Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Student: Question 38 on the FAFSA and/or Spouse: Question 39 on the FAFSA
Income Tax	\$8,644	Question 36 on the FAFSA
IRS Exemptions	4	Question 37 on the FAFSA
Education Credits	\$0	Question 43a on the FAFSA
IRA Deductions and Payments	\$0	Question 44b on the FAFSA
Tax-Exempt Interest Income	\$0	Question 44d on the FAFSA
Untaxed IRA Distributions	\$0	Question 44e on the FAFSA
Un Taxed Pensions	-\$3,771	Question 44f on the FAFSA

Transfer My Tax Information into the FAFSA
 Do Not Transfer My Tax Information and Return to the FAFSA

- ❑ Once you have transferred all the necessary tax information, proceed to "Sign & Submit." Both student and parent must enter their PIN and submit, if changes were made to both sections.
- ❑ A "Confirmation Page" will signify the completion and submission of your corrections; print this page for your records.

Confirmation Number: B 01034232104 03 02/28/2014 10:59:23
Data Release Number (DRN): 9999

2014-2015 Confirmation Page

PRINT THIS PAGE

Congratulations, JOHN! Your FAFSA was successfully submitted to Federal Student Aid and has been processed.

What Happens Next

- In 7-10 business days, we will mail you a Student Aid Report (SAR) notifying you that your FAFSA was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

School Name	Graduation Rate	Retention Rate	Transfer Rate	Additional Information from College Navigator
ALABAMA AGRICULTURE & MECHANICAL UNIV	32%	68%	NA	NA

Eligibility Information

Expected Family Contribution (EFC) = 999999
The EFC is a measure of how much you can contribute to the cost of your education. Schools use your EFC to determine your federal student aid eligibility.

Based on the eligibility criteria, you may be eligible for the following:
Direct Stafford Loan Estimate - \$5,500.00
You may also be eligible to receive other federal, state, or institutional grants, scholarships, and/or work-study.

Please note that once the FAFSA is submitted, it takes 3-5 business days for the Federal Processor to report it to the school.