

IRS Data Retrieval/Request for IRS Tax Return Transcript

If you have been selected for verification, you must verify the income you reported on your FAFSA. This can be done two ways: IRS Data Retrieval or Requesting a Tax Return Transcript.

IRS Data Retrieval

It takes up to three weeks for IRS income information to be available for electronic IRS tax return filers, and up to eleven weeks for paper IRS tax return filers.

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. This feature can be used only if you filed a 2013 Federal Income Tax Return. If you and/or your parent have not already used the tool:

- 1) Go to www.fafsa.gov and log in to your FAFSA record
- 2) Select 'Make FAFSA Corrections' and enter your PIN
- 3) Click on the 'Financial Information' tab
- 4) Look for the link that explains transferring your tax information from the IRS. Follow the instructions to access the IRS website and have your financial information imported into your FAFSA.
- 5) Do not change any of the information imported or it will be considered invalid. Continue to the last page to submit your FAFSA.

Those who are **NOT ABLE** to use the IRS Data Retrieval are:

- Individuals granted a filing extension by the IRS;
- Individuals who filed an amended IRS Income Tax Return;
- Individuals who were victims of IRS identity theft;
- Individuals who are married but filed separately;
- Individuals who filed a foreign income tax return; and
- Individual who filed electronically within two weeks or file a paper IRS tax return within eleven weeks.

If you are unable or choose not to use the IRS Data Retrieval Tool, you will need to request an IRS Tax Return Transcript.

Request an IRS Tax Return Transcript

Make sure to request the "IRS tax return transcript" and NOT the "IRS tax account transcript."

To obtain an IRS tax return transcript:

Online

- 1) Go to www.irs.gov
- 2) Under 'Tools'
 - a) Click on 'Get Transcript for My Tax Records'
- 3) Read instructions and choose 'Get Transcript Online' or 'Get Transcript by Mail'
- 4) If you choose:
 - a) 'Get Transcript by Mail', you will need to enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS.
 - i) Under 'Type of Transcript', select 'Return Transcript'
 - ii) Under for 'Tax Year', select '2013'
 - b) 'Get Transcript Online', you will need to follow the six-steps for the online process to create an account if you have not done so already.
 - i) Select 'Higher Education/Student Aid' as the reason you are requesting a transcript, then select the tax year.

Phone

- 1) Call 1-800-908-9946
- 2) Tax filers must follow prompts to enter their Social Security Number and the numbers in their street address.
- 3) Select 'Option 2' to request an IRS Tax Return Transcript and then enter the appropriate tax year.
- 4) Tax filers can expect to receive a tax return transcript within 5-10 business days

Mail or Fax

- 1) Request a 2013 Tax Return Transcript by mail or fax using form 4506-T. Download the form at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>

You will need your Social Security Number (SSN), date of birth, and the address on file with the IRS (normally this will be the address used when your 2013 IRS tax return was filed).