2015-2016 IRS Data Retrieval Tool

Data is available within 1-2 weeks of **electronically filling your taxes or 6-8 weeks of filing a paper tax return**. These instructions assume you have already filed your **2015-2016 FAFSA.**

STOP

Check to see if any of these situations apply to you:

- **Have you filed a 2014 amended tax return?** If so, you are required to submit to the Financial Aid Office:
    - Signed copy of your 1040X form that was filed with the IRS
    - signed copy of the original 2014 Federal Tax Return that was filed with the IRS AND
    - 2014 IRS Tax Return Transcript (see last page for instructions)
- **Have you filed an IRS extension for 2014?**
- Are you **married but file taxes separately from your spouse?**
- Have you (or your parents if Dependent) **had a marital status change** since January 1, 2015?

If any of the above apply, **you cannot use the online Data Retrieval Tool** and must *SKIP AHEAD TO SECTION 2.*

SECTION 1: How to Use the IRS Data Retrieval Tool (Linking your FAFSA with the IRS)

1. Go to **www.fafsa.gov**. If you have an FSA ID click "Login."

2. The **FSA User ID**, replaces the PIN to access your FAFSA data and is now used as your electronic signature on any Federal Student Aid website. If you have a FSA User ID, and are able to login, skip to question 6.

3. **If you don't have an FSA ID**, click the tab at the top of the log in screen and follow the prompts to create an FSA ID.

4. You will be taken to the following page where you will click **on create an FSA ID** and follow the prompts. (See the handout, "How to create an FSA ID" for more information).

5. After creating your FSA User ID and password, you will return to the FAFSA Website and click the login button.

6. Make sure the correct year's FAFSA is selected on the tab at the top of the screen.

7. Click on "Make FAFSA corrections".

8. Click on "Financial Information", at the top of the page and then press "NEXT" at the bottom. If you are a Dependent student you will be brought to the "Parent Financial Information" page. If you are an Independent student, you will be brought to the "Student Financial Information" page then follow directions below.

9. Change the first question regarding 2014 Tax Return to "already completed".

10. Answer the questions listed. As long as you can select **"No"** to each question, you should be eligible to use the Data Retrieval Tool. **If any of the provided situations apply, you are not eligible to use the Data Retrieval Tool.** If you are ineligible, please proceed to Section 2 of these instructions: "**I Am Not Eligible to Use the Data Retrieval Tool."**

11. Once all "No" boxes are checked, a box will appear beneath the questions. Enter your FSA ID and click **LINK TO IRS.**

12. You will be brought to the IRS website. Click "OK" to the terms.

13. On the IRS website, enter requested information *exactly as it appears on your tax return*:

- Name
- Date of Birth
- Filing Status
- Address

14. Click **Submit.**
If the IRS is able to validate your Identification your IRS tax information will display. Click **Transfer Now.**

15. You will be brought back to the FAFSA website where you will see the information transferred in. **Do not change any IRS information**. If you have questions about the information transferred, contact the Financial Aid Office.

16. In the box below the items transferred, enter the wages for each person that made up a consolidated AGI and answer remaining questions. Click **OK.** *You may now repeat steps 9-17 to use the Data Retrieval tool for the **Dependent Student's income** if applicable**.**

17. Click **Sign & Submit**, Enter FSA User ID, Agree to Terms.

18. Click **Submit FAFSA.** A confirmation page will be displayed to document that you have successfully completed the process.

SECTION 2: I am not Eligible to use the Data Retrieval Tool – How to obtain a Tax Return Transcript.

The Financial Aid Office cannot accept paper copies of your tax return. We must receive an official Tax Return Transcript from the IRS. You may obain a copy of your Tax Return Transcript at the IRS Website at www.irs.gov by clicking "Get a Tax Transcript by Mail".
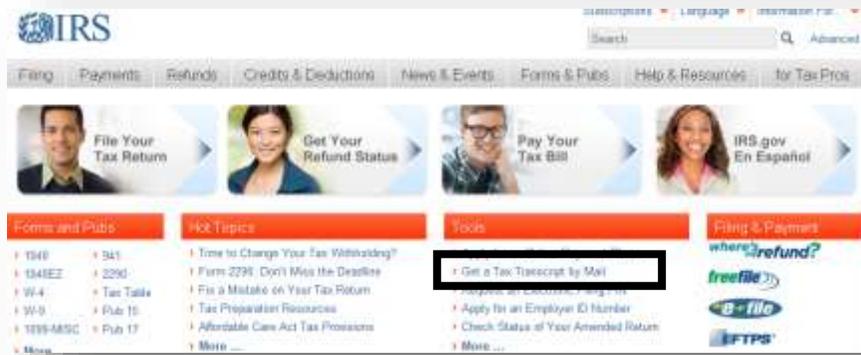
You will get your Tax Transcript by mail which usually takes 5-10 days. (You may be given the option to "Get the Transcript Online" from information off the IRS Website. This is the fastest method, though it is currently unavailable as of this printing.)

Make sure to provide the information requested **exactly as it appears on your tax return**.

Make sure to select **Tax _Return_ Transcript**. We are unable to accept the Tax _Account_ Transcript.

- To use **Get Transcript Online**, you must have a Social Security number (SSN) and immediate access to your email account to confirm your email address. Then you'll need to answer personal, financial and tax related questions to verify your identity. **Note:** If you previously registered for Get Transcript, an Identity Protection PIN (IP PIN) or an Online Payment Agreement, you should log in with the same user ID and password.
- To use **Get Transcript by Mail**, you need your SSN or an Individual Tax Identification Number (ITIN), date of birth, and address from your latest tax return.

Get Transcript ONLINE
- Transcripts ready to view, print, or download immediately*
- Transcript types available online
- Frequently asked questions (FAQs)

Get Transcript by MAIL
- Transcripts arrive in 5 to 10 calendar days at the address we have on file for you
- Transcript types available by mail
- Get Transcript by Mail en Español

You can get theTranscript by phone: call the IRS at 1-800-829-1040 or 1-800-908-9946

You may also mail a request to get the Transcript By Mail: complete and submit a 4506-T or 4506T-EZ and send it to the IRS.

Note: **If you filed an extension** and have not filed your taxes yet, we need your **Form 4868 Request for an Extension and your 2014 W2s** (If self employed you must provide a signed statement estimating your Adjusted Gross Income (AGI) and income taxes paid for 2014). We can process your verification with estimated numbers but once your taxes have been filed we will need a copy of your Tax Return Transcripts. Your awards may change to reflect the actual numbers on the Transcript.