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FAFSA IRS Data Retrieval Tool Instructions

The **FAFSA IRS Data Retrieval Tool** will allow you to transfer your tax record directly from the Internal Revenue Service (IRS) to the FAFSA (Free Application for Federal Student Aid). Tax filers who submitted their federal tax return electronically to the IRS should be able to use the IRS Data Retrieval Tool within 1-2 weeks after their tax returns were filed. Tax filers who mailed a paper tax return to the IRS should be able to use the IRS Data Retrieval Tool within 6-8 weeks after their tax returns were filed. Your tax information will be submitted to us electronically within 2-3 business days. The IRS Data Retrieval Tool can be used at the time you file your FAFSA or after you have filed your FAFSA as a FAFSA correction.

If you've already filed your FAFSA, go to the FAFSA website at www.fafsa.ed.gov to use FAFSA's IRS Data Retrieval Tool!

- Login to the FAFSA website using either the student's FSA ID or student's information.
  - ✓ ***IF YOU DO NOT HAVE AN FSA ID, YOU WILL NEED TO CREATE ONE TO COMPLETE THIS PROCESS***
- Select "Make FAFSA Corrections" for the appropriate aid year.
- Enter your (the student's) FSA ID and Password.
- Select the "Financial Information" tab from the menu bar at the top of the FAFSA Web page.
- **If you would like to use the IRS Data Retrieval Tool to transfer parent tax information to the FAFSA**, select "***Already Completed***" for the question that reads: "Have your parents completed their IRS income tax return or another tax return?"
  - A series of questions will appear one at a time:
    - Did you, the mother/father, file a Form 1040X amended tax return?
    - Did you, the mother/father, file a Puerto Rican or foreign tax return?
    - Did you, the mother/father, file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
  - A box will appear for parent to enter their FSA ID and Password, and Click the "Link to IRS" button
  - A notification will appear that you are leaving the FAFSA site, click "OK"
  - The IRS.gov site will display a box (…site is for authorized use…), click "OK"
  - You will need to confirm and/or enter demographic information and hit "submit" button
  - A summary of your information will appear along with two options, you will need to ***click on the radio button*** beneath "**Transfer My Tax Information into the FAFSA"** then click the "Transfer now" button.
  - When it has successfully transferred, you will be returned to the FAFSA application and receive a message that you have successfully saved your information.
  - Select the "Sign and Submit" tab at the top of FAFSA. A summary of the changes will appear. Review for accuracy. Both the parent and student's FSA ID and Password may be needed again as the signature.

- **If you would like to use the IRS Data Retrieval Tool to transfer student tax information to the FAFSA**, proceed to the student financial information section on the FAFSA website. Select "Already Completed" for the question that reads: "Have you (the student) completed your IRS income tax return or another tax return?"
  - Follow the same prompts as indicated above.

- After utilizing the IRS Data Retrieval Tool and returning the FAFSA website, select the "Sign & Submit" tab from the menu bar at the top of the FAFSA Web page and, at the bottom of that page, select "Submit My FAFSA Now" to submit your corrections.

IRS Tax Return Transcript Request Process

If you are not eligible to use the IRS Data Retrieval Tool, you may request a Tax Transcript online, by telephone, or via mail.

Request online to be mailed:

- Go to the IRS Website, **http://www.irs.gov/Individuals/Get-Transcript**
- Click **"Get Transcript by Mail"**
- Enter the tax filer's social security number, date of birth, street address, and zip code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click **"Continue"**
- In the **"Type of Transcript"** field, select **"Return Transcript"** and the **Tax Year** field, select **"2015"**
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS

Request by Telephone to be mailed:

- Call the IRS Automated Hotline at 1-800-908-9946
- Tax filers must follow the prompts to enter their social security number and the numbers in their street address. Generally this will be the numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select **"Option 2"** to request an IRS Tax Return Transcript and then enter **"2015"** when prompted
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS

Paper Request:

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript
- Download at **http://www.irs.gov/pub/irs-pdf/f4506tez.pdf**
- Complete lines 1-4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. **Wright State University Raider Connect prefers that families do not send an IRS Tax Return Transcript directly to our office for processing because we cannot guarantee that we will be able to match the IRS Tax Return Transcript to a student's verification worksheet that is sent separately.**
- On line 6, enter **"2015"** to receive IRS tax information for the 2015 tax year that is required for the 2016-2017 and 2017-2018 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or fax number) that is provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filers that it was unable to provide a transcript.