




### HOW TO USE THE IRS DATA RETRIEVAL TOOL

The best way to verify tax return information is by using the IRS Data Retrieval Tool which is part of the FAFSA on the Web application. If the student or parent(s) have not already used the tool,

- Go to [www.fafsa.gov](http://www.fafsa.gov)
- Login to the student's FAFSA record using their [FSA ID \(https://fsaid.ed.gov/npas/index.htm\)](https://fsaid.ed.gov/npas/index.htm)
- Select "Make FAFSA Corrections" and then enter a "Save Key"
- Navigate to the Financial Information section of the form
- From there, follow the on-screen instructions to determine if the student or parent(s) can use the IRS Data Retrieval Tool to transfer **2015** IRS income tax information into the student's FAFSA.
  - If you're eligible to use the tool you will see a button that says 
- If you click the "LINK TO IRS" button you will be redirected to the Internal Revenue Service web site. For parent's, you must enter the parent's FSA ID before clicking on the "Link to IRS" button.
  - Generally most, if not all, of the following fields' information is populated into the corresponding fields based on the answers reported on the FAFSA: *First Name, Last Name, Social Security Number, Date of Birth and filing status*. However, if this information is not pre-populated you will need to enter it.
  - Enter your address (**must match your 2015 Federal Income Tax Return**), city, state and zip code. Click "Submit" in the bottom right corner of the page.
- The tax data will be presented in a table showing "My Tax Information" in the center column and "FAFSA Question Numbers" in the right column.
- To transfer the data, click in the box to place a checkmark under "Transfer My Tax Information into the FAFSA" section and then click the "Transfer Now" button.
- Once you have transferred the data back into the FAFSA you will need to finish completing the application. At the end of the application you need to make sure you, and your parent (if applicable), sign your FAFSA using your FSA ID.  
**DO NOT click "SAVE" and EXIT the application as you still need to finish the rest of the application.**

### HOW TO REQUEST AN IRS TAX RETURN TRANSCRIPT

You can get a transcript by mail to view your tax account transactions or line-by-line tax return information for a specific tax year. The method you used to file your return and whether you have a refund or balance due, affects your [current year transcript availability](#).

To use the [Get Transcript by MAIL](#) service, you need the following: **1)** your Social Security number (SSN) or Individual Tax Identification Number (ITIN), **2)** date of birth, and **3)** mailing address from your latest tax return.

- Go to <https://www.irs.gov/Individuals/Get-Transcript> and click on the "Get Transcript by Mail" icon or simply click on the icon to the right to go directly to the web page and begin the process. Please Note: **Be sure to request the "IRS TAX RETURN TRANSCRIPT" and NOT the "IRS Tax Account Transcript"**
  - Transcripts arrive in 5 to 10 calendar days at the address the IRS has on file for you.
  - The IRS **never** sends email requesting that you obtain or access your transcripts. If you receive such an email, please forward it to the IRS fraud group at [phishing@irs.gov](mailto:phishing@irs.gov).



To use the [Get Transcript ONLINE](#) service you need the following: **1)** your SSN, date of birth, filing status and mailing address from your latest tax return, **2)** access to your email account, **3)** your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and **4)** a mobile phone with your name on the account.

1. Go to <https://www.irs.gov/Individuals/Get-Transcript> and click on the "Get Transcript ONLINE" icon or simply click on the icon to the right to go directly to the web page and begin the process. Please Note: **Be sure to request the "IRS TAX RETURN TRANSCRIPT" and NOT the "IRS Tax Account Transcript"**
  - If successful in account setup, you will be able to download/print your Tax Return Transcript.

