

**DIRECTIONS ON HOW TO USE THE IRS DATA RETRIEVAL TOOL
OR TO REQUEST AN IRS TAX RETURN TRANSCRIPT**

The Office of Federal Student Aid and the Internal Revenue Service have worked together to develop a process to simplify the steps that families must take each year to complete the Free Application for Federal Student Aid ("FAFSA").

The benefit (to families) of utilizing the IRS Data Retrieval Tool is that it will greatly simplify and expedite the verification process. We can NO LONGER accept copies of your federal tax return for the verification process. The fastest procedure is to use the IRS Data Retrieval Tool.

- You will first need to log into www.FAFSA.gov with your FSA ID. (Your FSA ID is one that you created when you filed your FAFSA.) Select the option "**Make FAFSA corrections.**"
- There will be an introduction page with some informational links, click **NEXT** to begin the correction process.
- Choose the "**Financial Information**" tab to access the Data Retrieval Tool. (You can click NEXT or PREVIOUS to navigate through your FAFSA.)
- There will be a drop down menu asking if you have completed your IRS income tax return; if you select "**Already Completed,**" you will be presented with a number of questions to determine if you are eligible to use the Data Retrieval Tool. If you answer "**None of the above,**" you will be presented with the option to enter your FSA ID and link to the IRS. (If you do not answer "None of the above" then you need to contact the IRS to order a tax return transcript).
- You will see a page telling you that you are leaving the FAFSA on the Web. Clicking OK will take you to the IRS website, where you will need to authenticate your identity before any personal information is displayed. (The information entered must be identical to the information that was filed on your 1040 with the IRS.)
- If the IRS is able to authenticate your identity, your IRS tax information will display. After viewing your tax data, you will have the option to transfer the tax information directly to the FAFSA application using the "**Transfer Now**" button; click OK to return to the FAFSA.
- After returning to the FAFSA, continue to the sign and submit section to submit your corrections.

If you make changes to the information after it is transferred, you will also be required to submit a tax return transcript.

Some families WILL NOT be able to use this tool

- A married independent applicant and spouse who filed separate tax returns;
- When the parents of a dependent student filed separate tax returns;
- An applicant or applicant's parent who have had a change in marital status after the end of the tax year (*last day in December*);
- The applicant, or parent or spouse, as applicable, who have filed an amended tax return;
- The applicant or the applicant's parent and or spouse, as applicable, have an unpaid federal tax liability

IMPORTANT NOTE: The *FAFSA on the Web* IRS Data Retrieval Process will only transfer information from an **original** tax return and not from an amended tax return. Similarly, the *IRS Tax Return Transcript* only includes information from the original tax return. While the *IRS Tax Account Transcript*, does include tax return items that were changed when an amended return was filed, it does not include all of the data that did not change. Therefore, **both** an *IRS Tax Return Transcript* and an *IRS 1040X form* must be obtained and submitted to the school for verification to be completed when an amended return was filed.

To request a tax return transcript:

By Phone: Call 1-800-908-9946

Online:

- Go to <http://www.irs.gov/Individuals/Get-Transcript>
- Enter the requested tax payer information
- Select “Return Transcript” and 2015 as Tax Year, Then Exit
- Transcripts will be mailed to you in approximately 10 days

When a tax return transcript is unavailable

If you request an IRS tax return transcript and are unsuccessful, you may be able to submit a signed copy of your 2015 tax return (Form 1040, 1040A, 1040EZ). You must also provide one of the following:

- If you tried to get the transcript using the paper Form 4506-T or 4506T-EZ, a copy of the response (which he/she must be signed) mailed to him/her informing him/her that the IRS could not provide a transcript; or
- If you tried to get the transcript using the Internet, a signed copy of a screen print from the official IRS webpage showing a message that the transcript request was unsuccessful; and
- Submit a completed and signed IRS Form 4506-T or 4506T-EZ to the WCCC Financial Aid Office that includes on line 5 the name, address, and telephone number of the WCCC Financial Aid Office as a third party to whom the IRS is to mail the tax return transcript.

Note: If you requested a tax transcript via telephone and were unsuccessful you will need to request one online or via paper form in order to provide WCCC with the proper documentation.