1.) How to use the IRS Data Retrieval Tool (easiest)

The Data Retrieval Tool (DTR) links your IRS tax information to your FAFSA

1. Access your FAFSA application and go to the “Financial Information” section. Read the options to determine if you and/or parents are eligible to use the Data Retrieval Tool.

If you have already processed your FAFSA click on Make FAFSA Corrections

2. Navigate to Financial Information Tab, mark “already completed” when asked about the status of your 2015 federal tax return. (* Your marital status and filing status should match on your FAFSA, in order to be able to use the IRS Data Retrieval Tool)

In the parent and/or student section of the FAFSA follow instructions and answer questions regarding: (yes/no)

- Filed an amended tax return?
- Filed a Puerto Rican or foreign tax return?
- Filed taxes electronically in the last 3 weeks (or by mail in the last 8 weeks)?

** If student/parent answer "NO" to all these questions, you will be ELIGIBLE to use the IRS data retrieval tool. If you answer “yes” you will not be able to use this tool.

3. If you are eligible to use the IRS tool, you will be asked to enter your FSA ID and click on LINK TO IRS

4. Once you are on the IRS site, input the information required (make sure it matches the information on your tax return)

Click Submit and if done correctly the IRS data will appear.

5. If you successfully accessed your tax information, check the box at the bottom of the screen “Transfer My Tax Information into the FAFSA” then click on the “Transfer Now” button.

6. You will be returned to your FAFSA and the DATA TRANSFER will be completed. (If student or parent is married, FAFSA may require additional documents such as a W2 in order to verify income)

7. Do not forget to SUBMIT your FAFSA; you will be asked to input your FSA ID (and your parents if applicable) once again.

8. If the DTR doesn’t work or you are not eligible to use it, you will need to submit the IRS tax return transcript (see Page 2)
2.) Financial Aid “How to” Retrieve your Tax Records by Mail in 3 Easy Steps

Easiest way for students to receive transcripts, if you were unable to link them to your FAFSA.

Please be advised it takes about 5-10 business days for you to receive your IRS transcripts.

(*Please note: Your transcripts will be sent to the address listed on your return)

1. Go to www.irs.gov/individuals/get-transcript

Click on

Get Transcript by MAIL

To use this service, you need your:
• SSN or Individual Tax Identification Number (ITIN)
• date of birth, and
• mailing address from your latest tax return

2. Follow the on screen instructions, enter:

➢ Social Security Number (SSN)
➢ Date of birth
➢ Address
➢ Zip Code

3. Follow Screen instructions

➢ Click on: Type of Transcript
➢ Select: Return Transcript

➢ Click on: Tax Year
➢ Select: 2015 (or year you need transcripts of)

To complete click, continue.

* Please allow 5-10 business days in order to receive your mailed transcripts from the IRS

Call 1-800-829-1040 to order them through the phone or visit the nearest IRS office at 501 W. Ocean Blvd, Long Beach CA 90802 (or visit your local IRS office)

3.) Financial Aid “How to” Retrieve your tax Records Online

1. Go to www.irs.gov/individuals/get-transcript

Click on

Get Transcript ONLINE

To register and use this service, you need:
• your SSN, date of birth, filing status and mailing address from latest tax return,
• access to your email account,
• your credit card number or account number from an auto loan, mortgage, home equity loan or home equity line of credit, and
• a mobile phone with your name on the account. (pay-as-you-go plans are NOT accepted)

You will be able to:
• View, print or download your transcript
• Access Transcript types available online (such as: Tax Return Transcript, Tax Account Transcript, Record of Account Transcript, Wage and Income Transcript, Verification of Non-filing Letter)
• Use your IRS Username and password to return later

2. Create an account or sign in with your USER ID and password.

You will be able to:

➢ View, print or download your transcript
➢ Access Transcript types available online (such as: Tax Return Transcript, Tax Account Transcript, Record of Account Transcript, Wage and Income Transcript, Verification of Non-filing Letter)
➢ Use your IRS Username and password to return later

3. Once you have an account, log in. Select Higher Education/Student Aid. Click on Return Transcript and/or Wage and Income Transcripts for the YEAR that the Financial Aid office requesting.

4. A new window will open with your transcripts (you may have to deactivate your POP-UP blocker.) You will need to have ADOBE reader installed on your computer (free at Adobe.com)

5. Print a copy of your transcripts and submit it to the financial aid office. We recommend that you also save a digital copy for your own personal records.