

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](#)

Welcome,

2018-2019 2017-2018

Current Application Status: Processed Successfully
Congratulations, your FAFSA was successfully processed.

What Happens Next

- Your FAFSA information was made available to the school(s) you listed on your FAFSA.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA
- [View Correction History](#) to view corrections made to your FAFSA
- [Create a shareable file with some of your student information using MyStudentData Download.](#)

2. Navigate to Financial Information Tab, mark “already completed” when asked about the status of your 2016 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.

Get My Federal Income Tax Information
See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information as it appears on your 2015 Federal Income Tax Return. [?] Required fields *

| | |
|--|----------------------------|
| First Name * | John |
| Last Name * | Doa |
| Social Security Number * | ***-**-6375 |
| Date of Birth * | 05 / 17 / 1982 |
| Filing Status * | Married-Filed Joint Return |
| Address - Must match your 2014 Federal Income Tax Return. [?] | |
| Street Address * | 123 Main Street |
| P.O. Box (Required if entered on your tax return) [?] | |
| Apt. Number (Required if entered on your tax return) | |
| Country * | United States |
| City, Town or Post Office * | Anytown |
| State/U.S. Territory * | California (CA) |
| ZIP Code * | 91234 |

Select the button below to exit the IRS system and return to your FAFSA. [Return to FAFSA](#)

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties. [Submit](#)

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.

Transfer My Tax Information into the FAFSA [?]

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information. [Transfer Now](#) [?]

Do Not Transfer My Tax Information and Return to the FAFSA [?]

By clicking the “Do Not Transfer” button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA. [Do Not Transfer](#) [?]

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 7-10 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



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 : 2016 (or year you need transcripts of)

To complete click, continue.

*** Please allow 7-10 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



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.**



First Time Users

If this is the first time you are using this online service, we will need to verify your identity before we proceed.

[GET STARTED](#)

Returning Users

Log in below if you've previously registered through any of the following applications:

- Get Transcript
- Identity Protection PIN (IP PIN)
- Online Payment Agreement (OPA)
- ePostcard

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.



[Sign In](#)

Get Transcript

Please select the reason you are requesting a transcript to help us determine the appropriate transcript for your needs.

- Higher Education/Student Aid
- FEMA/Disaster Related
- State or Local Tax Issue
- Mortgage Related
- State Licensing
- Income Verification
- Federal Tax
- Small Business Loan
- Health Care
- Immigration
- Housing Assistance
- Other

You selected **Higher Education/Student Aid**
We suggest you download: **Return Transcript**

Below are the transcripts and years available

| Return Transcript | Record of Account Transcript |
|---|-----------------------------------|
| 2013.* 2012 2011 2010.* | N/A 2012 2011 N/A |
| N/A | 2012 2011 N/A N/A N/A N/A N/A N/A |
| 2013 2012 2011 2010 2009 2008 2007 2006 2005 2004 | |

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.