



## IRS Data Retrieval/Request for IRS Tax Transcript 2019-2020 Financial Aid Verification

If you have been selected for verification, we must verify the income you reported on your FAFSA. This can be done in two ways: IRS Data Retrieval Tool or requesting an IRS Tax Return Transcript. The Financial Aid Office no longer accepts photocopied Federal Tax Returns.

### IRS Data Retrieval Tool (DRT)

It takes up to three weeks for IRS income information to be available for electronic IRS tax return filers, and up to eleven weeks for paper IRS tax return filers.

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of the FAFSA on the Web. This feature can be used only if you filed a **2017 Federal Income Tax Return**. If you and/or your parent(s) have not already used the tool you can do the following;

1. Go to [www.fafsa.ed.gov](http://www.fafsa.ed.gov) and log into your FAFSA record
2. To use the Data Retrieval tool click on “**Make FAFSA Corrections**”
3. Click on the “**Financial Information**” tab
4. You will be prompted to answer if you/and or your parent(s) completed an income tax return or another tax return for **2017**
5. Select “**Already Completed**”, this will prompt the following: Married Filing Separately, Head of Household, Amended tax return, a Puerto Rican, and/or Foreign tax return  
Those who are **Not Able** to use the IRS Data Retrieval Tool are:
  - Individuals granted a filing extension by the IRS
  - Individuals who filed an amended IRS Income Tax Return
  - Individuals who were victims of IRS Identity Theft
  - Individuals who are married but filed separately
  - Individuals who filed a foreign income tax return; and
  - Individuals who filed electronically within two weeks or filed a paper IRS Income Tax Return within eleven weeks
6. You will then be prompted to select a parent (if dependent) and enter their respective FSA ID. Then click, “**Link to IRS**” tab
7. On the IRS website enter all requested information (verify filing status, and address). Once the IRS validates your identification your IRS tax information will be displayed. You will then be given the option to, “**Transfer Now**” or return to FAFSA where you will be asked to manually enter your information
8. After clicking, the small box located at the left click “**Transfer Now**”, you will get a response that reads, “You have successfully transferred your 2017 tax information.”
9. You are **NOT DONE!!** Be sure to complete, sign and submit the section and electronically sign with your FSA ID. You are not finished until you have received a confirmation number and Expected Family Contribution (EFC) number. To complete verification you must also submit a signed copy of the verification form for the group you have been placed in.

If you are unable or choose not use the IRS Date Retrieval Tool, you will need to request an IRS Tax Return Transcript. **Instructions on reverse side.**

## **REQUEST AN IRS TAX RETURN TRANSCRIPT**

Tax Filers and Non Tax Filers can request from the IRS an **IRS Tax Return Transcript** *free of charge*, in one of three ways;

### **Online Request**

- Go to [www.irs.gov](http://www.irs.gov)
- In the Tools section of the homepage click, “**Get Your Tax Record**”
- Click, “**Get Transcript by Mail**” *or* “**Get Transcript Online**”
- Make sure to do the following:
  - please enter all personal data (click submit)
  - Select type of return, “**Return Transcript**” *not* “**Account Transcript**”
  - Select what tax year, **2017**

### **Automated Telephone Request**

- Available from the IRS by calling (800) 908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be number of the street address that was listed on the latest tax return filed. However, if an address change has been completed either through the IRS or the US Postal Service, the IRS may have the updated address on file. For a joint tax return, use the primary tax filer’s social security number, date of birth, street address, and zip or postal code.
- Select, “**Option 2**” to request an IRS Tax Return Transcript and then enter the tax year (2017)

### **Order by Mail or Fax**

To order a Tax Return Transcript by mail, please complete a [4506-T or 4506T-EZ Form](#) (PDF). There is no charge for the transcript and you should receive your transcript within 10 business day from the time they receive your request. Download the form at: [www.irs.gov/pub/irs-pdf/f4506t.pdf](http://www.irs.gov/pub/irs-pdf/f4506t.pdf)

- ❖ If you had to Amend your 2017 tax returns, you will need a transcript of your original taxes along with the amended information, “Tax Account Transcript.”

## **SEND OR FAX TAX TRANSCRIPT TO THE FINANCIAL AID OFFICE**

- You may **fax** your tax transcript to **505.747.2121**
- **Mail** your tax transcript to;
  - Northern Financial Aid Office
  - 921 Paseo de Oñate
  - Espanola, NM 87532
- Please be sure to write the name and eagle ID of the student on the tax return transcript
- **DO NOT** request that the transcript be sent directly to Northern as the IRS is unable to provide the requested information to a third party.

**Please feel free to contact the Financial Aid Office if you have any questions, concerns, or comments and we will be happy to assist you.**