Instructions for Completing IRS Data Retrieval After You Have Filed the FAFSA
(Successful Completion Will Satisfy Tax Transcript Requirement)

It is strongly recommended that students opt to use the **IRS Data Retrieval option** during the initial FAFSA or when corrections are made to a 2015-16 FAFSA application. This option will streamline the processing of the financial aid application and will take the place of an official IRS Tax Transcript for students selected for verification.

Students and/or parents may not have completed their taxes or submitted them electronically when they completed the FAFSA. In these cases, students and/or parents will be able to use the IRS Data Retrieval process **approximately three weeks after tax returns are e-filed or eight weeks after paper returns are mailed to the IRS**.

Instructions to use IRS Data Retrieval:

- Go to www.fafsa.gov
- Choose 2015-2016 FAFSA
- Under "Returning User" Select "Make a Correction"
- Navigate to the income section for the student and/or parent(s) (if a dependent student)
- Mark "Already Completed" when asked about the status of your 2014 federal tax return
- In the parent and/or student section of the FAFSA, follow the instructions and answer the questions regarding:
    - Married Filing Separately
    - Head of Household [a tax designation for some underlined unmarried individuals]
    - 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 and/or parent (if a dependent student) answer "No" to all of the questions above, they may be eligible to use the IRS Data Retrieval Tool. (Cannot answer no to all questions? See more information in "Exceptions" below).
- Another log in for the IRS will appear. Enter the student and/or parent (if a dependent student) FSA ID and password. If you or your parent have not yet created an FSA ID and password, click on "Create an FSA ID" and follow the prompts.
- A screen will appear to enter the name and the address of the taxpayer.
    - Use the official U.S. Postal Service address for the home listed on the tax return.
- After reviewing the IRS information, choose "Transfer Now"
- Remember to **sign** and **submit** the FAFSA transaction after income data has been retrieved!

According to the IRS:
- *Electronically* filed tax return information will be available online from the IRS site in 2-3 weeks after the return has been filed
- Data from *paper* tax returns will be available in 6-8 weeks

EXCEPTIONS

Unfortunately, the Data Retrieval Process cannot be used in the **following circumstances** and the applicant will have to request a Tax Return Transcript from the IRS:
* When a paper FAFSA is completed
* Filed "Married Filing Separately" return
* Filed "Amended" return
* Filed "Foreign" return
* Marital status changed after December 31
* Applicant has made changes to IRS Data Retrieval information on FAFSA

If you are amongst those who are ineligible to use or elect not to use the IRS Data Retrieval option and you are selected for verification, then you will need to request an IRS Tax Return Transcript.

Tax Return Transcript Request Instructions, 2015-2016

Tax filers can request a transcript of their 2014 tax return, free of charge, from the IRS by one of the following methods:

Online Request

Available at http://www.irs.gov/transcript

The IRS system for ordering a transcript is now available. It allows a person to get a transcript online as a PDF immediately if the tax return for the chosen year has been processed. You may also use this site to request a transcript by mail.

- To use **Get Transcript Online**, you must have access to your email account to confirm your email address and then answer personal, financial and tax related questions to verify your identity. If you previously registered, just log in with your user ID and password.
- To use **Get Transcript by Mail**, you need your Social Security number (SSN) or Individual Tax Identification Number (ITIN), date of birth and address from your latest tax return.
- You will need to create an account initially by providing your name, e-mail, address, social security number and answering some security questions (you may need access to current or old loan information, loan payments, etc., for the security questions).
- You can print the tax transcript or save it as a PDF.
- Use the back button to get back to the previous screen to pull up multiple documents.
- Be sure to logout when you are finished.
- Submit the tax return transcript to Moraine Park; make sure to include the student's name and N number on the transcript.

Telephone Request

Available from the IRS by calling **1-800-908-9946**

- You may be able to request that the transcript be faxed rather than mailed.
- Submit the tax return transcript to Moraine Park; make sure to include the student's name and N number on the transcript.

Paper Request Form – IRS Form 4506T-EZ
Available via download at www.irs.gov/ or at www.morainepark.edu/financialaid/

- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 3: enter the tax filer's street address and zip or postal code. Use the address currently on file with the IRS.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. **Do not have your Tax Return Transcript sent directly to Moraine Park**.
- Line 6: in the Tax Year field, **enter "2014".**
- The tax filer must sign and date the form and enter their telephone number. Only one signature is required when requesting a joint tax return transcript.
- Mail or fax the completed IRS Form 4506T-EZ to the address (or FAX number) provided on page 2 of Form 4506T-EZ.
- If the 4506T-EZ information is successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address provided on their request within 5 to 10 days.
- Submit the tax return transcript to Moraine Park; make sure to include the student's name and N number on the transcript.

You may still go to www.fafsa.gov and choose to import your tax data directly from the IRS. This is the fastest option.

Please visit morainepark.edu/financial-aid/,email financialaid@morainepark.edu, or call Student Services at 920-924-3207 if you have further questions.