IRS Data Retrieval/Tax Return Transcript Directions

The IRS Data Retrieval Tool, or a Tax Return Transcript, should be available 2 to 3 weeks AFTER your taxes have been e-filed or 8-10 weeks AFTER they have been paper filed.

To utilize the IRS Data Retrieval Tool (DRT) please follow the steps below: (Recommended)

1) Go to **www.fafsa.ed.gov**
2) Select "Login"
3) Enter the student's information and select "next"
4) Select "make FAFSA correction" toward the bottom left and then select "next"
5) Enter student's PIN# and password (or create a new password if you have not done so already) and select "next"
6) Once logged into the FAFSA go to the "financial information" section of the application (use the menu bar across the top of the page)
7) Parent financial information page will appear first (make sure you have indicated that you have "already filed" a tax return)
8) **You will answer a set of questions which will determine whether or not you are eligible to utilize DRT** (such as: did you file married filing separate, did you file a foreign tax return, did you recently file your taxes)
    a. If you are able to select "none of the above" then it will give you the option to utilize DRT
        i. When deciding whether or not to select "have your recently filed" please keep in mind the time lines listed at the top of the page
        ii. **NOTE**: You cannot use DRT if you filed an amended return and you must request a Record Of Account (instructions on reverse side)
    b. If you are not able to select "none of the above" because one of the situations applies to you then you must request a copy of your tax return transcript (instructions below)
9) Assuming you were eligible to use DRT you will now be asked to enter your parent PIN# and select the "link to the IRS" option
10) You will be directed to an IRS website where you will be asked to fill in information (such as name, address, filing status) to verify your identity
    a. Make sure the address information you input matches **EXACTLY** what is shown on your tax return (word for word, abbreviation for abbreviation)
    b. Once all the information is input select "submit" on the bottom right
11) You will now see a "summary page" of your information and you will scroll down to the bottom of the page, select the box to the left of the "transfer data" option and then select the "transfer now" button on the right
    a. If you receive an error message you can select "try again" to make sure you entered all of the information correctly
    b. If you still receive an error message you will need to request a tax return transcript (instructions below)
12) You will then receive notification that your data has been successfully transferred and you will be directed back to the FAFSA
    a. If necessary complete the same process to transfer the student tax data
13) **Make sure that you continue to the end of the FAFSA to the "sign and submit" section to sign and submit the correction for processing. The school will receive notification a few business days later.**

To request a copy of your Tax Return Transcript please utilize one of the options below:

1. Online at www.irs.gov by selection "Order a Return or Account Transcript"
    a. Enter requested information and select "continue"
    b. Make sure to order a "Return Transcript" NOT an "Account Transcript"
2. Over the phone (automated) at 1-800-908-9946
    a. Enter information as prompted
    b. Make sure to order a "Return Transcript" NOT an "Account Transcript"
3. Complete IRS Form 4506T-EZ (found at www.irs.gov by searching 4506T-EZ) and mail/fax to the appropriate IRS office for processing by following the instructions on the 2nd page of the form

(continued on reverse)

a. You can select to have the IRS send the transcript directly to MacMurray College by completing question 5 on form 4506T-EZ

To request a copy of your Record of Account (if you filed an amended return) please follow the steps below:

1. Complete IRS Form 4506-T (found at www.irs.gov by searching 4506-T) and mail/fax to appropriate IRS office for processing by following the instructions on the 2nd page of the form.
   a. You can select to have the IRS send the record of account directly to MacMurray College by completing question 5 on the form 4506-T

Verification of 2012 IRS Income Tax Return Information for Individuals with Unusual Circumstances

Verification of 2012 IRS Income Tax Return Information for Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2012 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of the IRS Form 4868, ''Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,'' that was filed with the IRS for tax year 2012; and
- A copy of IRS Form W–2 for each source of employment income received for tax year 2012 and, if self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2012.

Verification of 2012 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2012, provide both of the following:

- A signed copy of the original 2012 IRS income tax return that was filed with the IRS or a **2012 IRS Tax Return Transcript** (signature not required) for the 2012 tax year; and
- A signed copy of the 2012 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Verification of 2012 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who has been unable to obtain a **2012 IRS Tax Return Transcript** or use the IRS DRT must provide a signed copy of the 2012 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 "Identity Theft Affidavit" if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him or her to submit one, he or she may provide one of the following:

- A statement signed and dated by the individual indicating that he or she was a victim of IRS identity theft and that the IRS is investigating the matter. The statement must also indicate that the individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he or she was not required to file the form; or
- A copy of a police report if it was filed related to the IRS identify theft.

Verification of 2012 Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns

If an individual filed or will file a 2012 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, provide a signed copy of that 2012 income tax return(s).