



## IRS DATA RETRIEVAL INSTRUCTIONS

Students and parents who have filed their 2017 IRS tax return will be able to select the IRS Data Retrieval option on the Free Application for Federal Student Aid (FAFSA) to transfer tax information to the FAFSA. We **strongly encourage** you to select this option during the initial filing or when subsequent corrections are made to your 2019-2020 FAFSA. This option will streamline and expedite the processing of your financial aid application.

### To successfully use this option you must:

- Have a federal tax return filed with the IRS.
- Have a valid social security number.
- Have a Federal Student Aid (FSA) ID. (Both parents & students can get a FSA ID at <https://fsaid.ed.gov/npas/index.htm>. Students will be prompted to create a FSA ID when signing on to their FAFSA.)

### You will be unable to use the IRS Data Retrieval option if:

- Your marital status changed after December 31, 2017.
- You filed married filing separately.
- You filed an amended return.
- You filed a foreign tax return.
- You filed a tax return using a Tax ID Number (TIN).
- The home address on the FAFSA does not match the address on the tax return.

**Once you have completed your taxes, wait the appropriate length of time (2-3 weeks after electronically filing a tax return or 6-8 weeks after filing paper tax returns)\* and follow these steps:**

1. Go to [fafsa.ed.gov](https://fafsa.ed.gov) and select the "Start Here" button
2. The student must log in using their student FSA ID
3. Select the "Continue" or "Make a Correction" button
4. Select the "Financial Information" tab from the top of the page.

### Instructions for the parent to request the parent tax information using the IRS Data Retrieval:

1. Go to "Parent Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible for IRS data retrieval, enter the FSA ID for the parent providing the information
4. Click "Link to IRS"
5. Review the information displayed and select the "Transfer My Information into the FAFSA" option
6. You will know that your federal tax return information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA form.
7. Proceed to the Sign and Submit page

### Instructions for the student to request the student tax information using the IRS Data Retrieval:

1. Go to "Student Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, click "Link to IRS"
4. Review the information displayed and select the "Transfer My Information into the FAFSA" option
5. You will know that your federal tax return information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA form.
6. Proceed to the Sign and Submit page

## INSTRUCTIONS FOR OBTAINING A TAX RETURN TRANSCRIPT

Tax filers can request a transcript, free of charge, of their tax return from the IRS in one of 3 ways:

### ONLINE REQUEST

- Log onto [www.irs.gov](http://www.irs.gov)
- On the homepage under tools, click “Get a Tax Transcript”
- Select either “Get Transcript Online” or “Get Transcript by Mail” (by mail will take 5-10 business days)
- You will be asked to create a login, if you do not already have one
- Enter the tax filer’s SSN, Date of Birth and Address (the one currently on file with the IRS)
- Click “Continue”
- In the Type of Transcript field, select “**Tax Return Transcript**” and enter appropriate tax year

### PHONE REQUEST

- Call the IRS at 1-800-908-9946
- Follow prompts to enter tax filer’s SSN and Street Address (the one currently on file with the IRS)
- Select the option to request an **IRS Tax Return Transcript** and enter appropriate tax year

### PAPER REQUEST FORM (IRS Form 4506T-EZ)

- Available for download at [www.irs.gov](http://www.irs.gov)
- Complete lines 1-4, following the instructions on page 2 of the form (use the address currently on file with the IRS)
- On line 6, enter the tax form you filed. Select option a, **Return Transcript**
- Tax filers must sign and date the form and enter their telephone number
- Mail or fax the completed 4506-T to the appropriate address or fax number provided on page 2 of the instructions

If all information is successfully validated, then the tax filer can expect to receive the IRS Tax Return Transcript within 5-10 days (for paper requests, the IRS must receive and process the form first). The transcript will be sent to the address used to complete the request. You will then forward it to the Financial Aid Office by either faxing it to (508) 767-7376, emailing it to [fa@assumption.edu](mailto:fa@assumption.edu), or mailing it to the office. Make sure to include the student’s name and ID# so the transcript can be properly tracked.

Note: If you filed your tax return electronically, it takes about 3 weeks before a transcript becomes available. If you mailed your tax return, it takes about 6 weeks. If you didn’t pay all the tax you owe, your transcript may not be available until a week after you pay the full amount owed. Refer to “Transcript Availability” at [IRS.gov](http://IRS.gov) for more information.