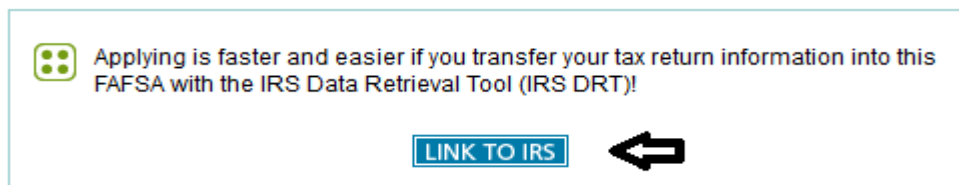


How to Use the IRS Data Retrieval Tool

Verification is a process where the Department of Education requires schools to collect the student and parent/spouse's official federal tax information. All tax information must come directly from the Internal Revenue Service (IRS). The best way to do this is by using the IRS Data Retrieval Tool in the FAFSA application.

*You're not eligible to use the Data Retrieval Tool if you:

- A victim of Identity theft
 - Filed an amended tax Return
 - Married person filed head of household
 - Granted a filing extension
 - Marital status change
- Go to fafsa.ed.gov, select the "Login" button, and enter your FSA ID
 - Select the "Make FAFSA Correction" button, enter a Save Key, and select NEXT
 - Select the "Financial Information" tab from the top of the page.
 1. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
 2. If eligible click "Link to IRS"
 3. Parents will need to enter their FSA ID to complete this process for their tax information



4. Enter the address information EXACTLY how it was submitted on your taxes.
5. Select the option that says Transfer Now located at the bottom of the page.
6. The tax information you transfer from the IRS into your FAFSA form won't be visible to you. You will see "Transferred from the IRS" in the appropriate fields on the FAFSA and other documents.

DO NOT make any changes to information transferred. Altering the information will cause the transfer to be invalid and will require us to request a hard copy of your tax transcripts from the IRS. If you are unable to use this option, additional options for obtaining IRS Transcripts are listed on the second page of this document.

- In Person – will need to make an appointment – St. Louis
Robert Young Federal Building
1222 Spruce Street
St. Louis, MO 63102
1-844-545-5640
- In Person – will need to make an appointment – Chicago
John C. Kluczynski Federal Building
230 S. Dearborn St.
Chicago, IL 60604
1-844-545-5640
- In Person – will need to make an appointment – Detroit
Ally Detroit Center
500 Woodward Ave.
Detroit, MI 48226
1-844-545-5640

Parents and Independent Students who did not file taxes will need to request a **Wage and Income Transcript** and **Verification of Non-filing Letter** in order to complete verification.



How to Request a 2017 Tax Return Transcript or Verification of Non-filing Letter from the IRS

Requesting a Tax Return Transcript to be Mailed:

1. Visit <http://www.irs.gov>. Under the "Tools" section, select "Get a Tax Transcript"
2. Choose "Get Transcript by Mail". Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript".
3. Enter your information and the address listed on your taxes, then click "Continue"
4. Select "Return Transcript" from the "Type of Transcript" drop-down menu and then select the 2017 tax year.
5. Click "Continue"
6. You will receive a copy within 5-10 calendar days.

Requesting a Tax Return Transcript by Phone:

1. Call the IRS at 1-800-908-9946.
2. Follow prompts for the language of choice, Press 2 for "Answers about personal income taxes"
3. Press 1 for "Questions about a form you already submitted..."
4. Press 2 for "Tax Return Transcript"
5. Enter the SSN, Address and follow the prompts including the year for "2017"
6. Continue with the prompts until you have successfully requested the transcript
7. You will receive a copy within 5-10 calendar days.

Requesting a Tax Return Transcript as a PDF: (see #5 for items needed to create an account w/the IRS)

1. Visit <http://www.irs.gov>. Under the "Tools" section, select "Get a Tax Transcript"
2. Choose "Get Transcript Online"
3. Select "Get Started" unless you're a returning user to the IRS website
4. Follow the steps on the screen
5. You will need the following information to create the account
 - a. Full name
 - b. Email
 - c. Birthdate
 - d. Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
 - e. Tax Filing Status
 - f. Current Address
6. Enter the Security code when prompted
7. Select "Higher Education/Student Aid" for the reason you need a transcript
8. Select "Return Transcript" from the "Type of Transcript" drop-down menu and then select the 2016 tax year.
9. You should then be able to print a PDF version of the Tax Return Transcript and even save it to your computer.

Requesting a Verification of Non-filing Letter:

1. Visit <http://www.irs.gov>. Under the "Tools" section, select "Get a Tax Transcript"
2. Choose "Transcript Types" under "What You Get"
3. Click the link for "Form 4506-T, Request for Transcript of Tax Return"
4. Click "Form 4506-T" under "Current Products"
5. Complete the form and be sure to check the box to the right of "7"
6. Mail or fax the form to the address/fax number provided for the state with which you lived during 2017
7. You will receive the letter within 5-10 calendar days.

OR

1. Follow the steps above for requesting a Tax Return Transcript as a PDF but select the option to print a Confirmation of Non-filing status letter

