

# IRS DATA RETRIEVAL/TAX RETURN TRANSCRIPT INSTRUCTIONS

## Notes:

- The IRS Data Retrieval is the preferred method to verify tax information because it is the fastest, easiest and most **secure** method available.
- You do NOT need to complete both. You can choose whether to complete the IRS Data Retrieval OR to request a Tax Return Transcript. Again the preferred method is the IRS Data Retrieval.
- Nontax filers and tax filers who received an extension but still have not filed their income tax return must provide confirmation of nonfiling dated on or after Oct. 1, 2018. A confirmation of nonfiling can be obtained from the IRS using Form 4506-T and checking box 7. If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.

## How to Complete the IRS Data Retrieval

1. Log into FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
2. Select "Login"
3. Enter FSA ID username and password for student and select "Next"
  - If a FSA ID has not been created, please select create an FSA ID username and password
4. Select "Make FAFSA Correction" (bottom left) and select "Next"
5. Enter Save Key or create a Save Key and select "Next"
6. Select the "Financial Information" section from the menu bar at the top of the page
7. You will be asked if you have completed your 2017 IRS Income Tax Return
  - You must be able to select "Already Completed" to continue
8. You will be asked the following questions:  
Did you file a Puerto Rican or foreign tax return?
  - You must be able to answer "No" to the above question in order to continue
  - If you filed an amended tax return (1040X), please contact the financial aid office for further guidance
9. Enter the Parent 1 or Parent 2 FSA ID username and password and select "Link to the IRS"
  - You will receive a prompt stating that you are now leaving FAFSA on the Web
10. Select "OK"
  - You will receive a prompt stating that you are now using and entering a Government website
11. Select "OK"
12. Review the prefilled information and make sure that the first name,

last name, social security number and date of birth are correct

- Select the appropriate filing status
  - Enter the address EXACTLY as it is shown on your tax return (word for word, abbreviation for abbreviation, case sensitive)
13. Select "Submit"
  14. You will now see a summary page of the information that will be transferred into the FAFSA
    - Scroll to the bottom of the page
    - Check the box to the left of the "Transfer Data to FAFSA" option
    - Select "Transfer Now"
  15. You will receive notification that the data has been successfully transferred and will be directed back to the FAFSA
  16. If necessary, complete the same steps to transfer the student tax data.
  17. Select the "Sign and Submit" section from the menu bar at the top of the page
    - Sign the FAFSA with the appropriate FSA ID and submit the correction for processing

## How to Order a Tax Return Transcript/Non-Filing Letter

1. Online at [www.irs.gov](http://www.irs.gov)
  - Select "Get Tax Records"
  - Select "Get Transcript by Mail" or select online
  - Enter all fields per filed IRS Tax Form
  - Select Type of Transcript  
Select Return Transcript  
Select 2017 tax year  
Note: If a joint return, use primary SSN on return.
2. Call (800) 908-9946
  - Enter information as prompted
  - Make sure to order a "Return Transcript" and NOT an "Account Transcript"
3. IRS Form 4506T-EZ – must file 4506T for non-filing confirmation
  - Form can be found at [www.irs.gov](http://www.irs.gov) by searching 4506T-EZ
  - Mail to the appropriate IRS office by following the instructions on the second page of the form
  - **Enter Concordia ID on line 5b, not SSN**

NOTE: Record of Account Transcript or Account Transcript is not acceptable for the verification process according to Federal guidelines. You must submit a Tax Return Transcript.

