

## **\*\*Completing the FAFSA Using IRS Tax Retrieval\*\***

### **Using IRS Tax Retrieval**

You and/or your parent(s) are required to submit income information on the Free Application for Federal Student Aid (FAFSA). Please **login to [www.fafsa.gov](http://www.fafsa.gov) to complete the FAFSA for the first time or to make corrections using IRS Data Retrieval.** IRS Data Retrieval allows you to obtain your income information directly from the IRS. Please allow time for the IRS to process your tax return before using IRS Data Retrieval. Tax return information will be available approximately 1-2 weeks after electronically filing and 6-8 weeks after filing a paper tax return. Please plan accordingly.

- **When using the IRS Tax Retrieval process, please remember that the IRS uses the U. S. Postal System format for tax filers' addresses.** You must enter your mailing address using the U.S.P.S. format, which may differ from the format you used to file your taxes. For example, if you indicated your street address was, '15 Meadow Drive' the IRS will automatically change 'Drive' to 'Dr' and IRS Data Retrieval will not work unless you also indicate 'Dr'. To verify your official U.S.P.S. address, please visit [www.usps.gov](http://www.usps.gov), and select, 'Look Up a ZIP Code'.
- If you filed jointly, you may need to enter the information of the person listed as the primary tax filer.
- **If you owe the IRS a payment of taxes**, or if you owed, but have now paid the IRS a payment of taxes, you may not be able to utilize the IRS Tax Retrieval process until after the tax filing deadline.

**DO NOT change the tax information on your FAFSA once it has been retrieved electronically. If you do, processing will stop on your financial aid package and you will have to provide additional documentation to the Financial Aid Office.**

### **Who CANNOT use the IRS Tax Retrieval Process?**

These conditions apply to both students and parents unless otherwise noted:

- The person did not indicate on the FAFSA that the tax return has been completed.
- The marriage date is January 2016 or later.
- The first three digits of the SSN are 666.
- The tax return was amended \*.
- The person filed a Puerto Rican or foreign tax return.
- The person is married and filed the tax return either as head of household or married but filing a separate return.
- Neither married parent entered a valid SSN.
- A non-married parent or both married parents entered all zeroes for the SSN.

**If the IRS Tax Retrieval process cannot be used on FAFSA on the Web, students must provide an IRS Tax Return Transcript for the student and spouse or parents, as applicable.**

### **Requesting a tax transcript to provide to the Financial Aid Office:**

There are a few ways to request a tax transcript: online at [www.irs.gov](http://www.irs.gov), by calling 1-800-908-9946, or by mailing or faxing the paper Form 4506T-EZ, which can be printed from the IRS website.

### **\* Amended Tax Returns**

You must provide a copy of your 2015 tax return transcript and a copy of your 2015 amended tax return (signed).

### **Tax Filing Extensions**

You may be asked to provide income documentation while waiting for your tax return to be processed. The Financial Aid Office will notify you of requirements.