

How to use the IRS Data Retrieval Tool

These step by step instructions assume that you have already submitted a FAFSA and are intended to assist you in updating your FAFSA using the online IRS Data Retrieval Tool.

Step 1: Go to www.fafsa.gov and click “Login.”

Step 2: Enter your FSA Username and Password and click “Next.”

Step 3: Read the Disclaimer and click **Accept**.

Step 4: Click “**Make FAFSA Corrections**.”

Step 5: Create a Save Key and click “Next.”

Step 6: Click on the “**Financial Information**” tab. Select “**Already Completed**” for the tax return filing status and answer the eligibility questions.

Step 7: If you are eligible to use the IRS Data Retrieval Tool, you can now click on the “**LINK TO IRS**” button. If you are not eligible to use the IRS Data Retrieval Tool, proceed to the "Ordering IRS Transcripts" on the tab above.

Step 8: Enter the FSA ID Username or Verified E-mail Address and FSA ID Password. **Click Proceed to IRS Site** to leave the FAFSA website and enter the IRS Data Retrieval Tool website.

Step 9: Click “**OK**” to accept the IRS Data Retrieval Tool terms of use.

Step 10: Enter the requested information and click “**Submit**.” Remember to enter your address exactly as it appeared when you filed your taxes.

Step 11: Review the information that the IRS has retrieved from your tax returns. Select “**Transfer My Tax Information into the FAFSA**” and click “**Transfer Now**.” Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.

Step 12: Answer the additional questions and click “Next.”

NOTE: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financial Information Section and once under the Parent Financial Information Section before submitting the FAFSA.

Step 13: Continue to the “**Sign & Submit**” tab. Follow all of the instructions carefully to submit your FAFSA correction.

Remember to print or save the confirmation page for your records.

How to Request an IRS Tax Return Transcript

Tax filers can request a transcript, free of charge, of their 2018 tax return from the IRS in one of three ways.

Online Request

- Available on the IRS Web site at www.irs.gov
- Click the “Get Your Tax Record” section on the homepage
- Click “Get Transcript Online” or “Get Transcript by Mail”
- Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click “Continue”
- In the Type of Transcript field, **select “Tax Return Transcript”** and in the Tax Year field, **select “2018”**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.
- Sign and submit the IRS Verification of Non-filing Letter, if requested, to CNU’s Office of Financial Aid; make sure to include the student’s name and student ID number on the letter.

Telephone Request

- Available from the IRS by calling **1-800-908-9946**
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select **“Option 2”** to request an IRS Tax Return Transcript and then enter **“2018”**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.
- Sign and submit the IRS Verification of Non-filing Letter, if requested, to CNU’s Office of Financial Aid; make sure to include the student’s name and student ID number on the letter.

Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form.

Note that line 3 should be the most current address as filed with the IRS.

It is the address where the IRS Tax Return Transcript will be sent.

If the address has recently changed, include the address listed on the latest tax return filed on Line 4.

However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.

Line 5 provides filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. Do not have your IRS Tax Return Transcript sent directly to CNU.

On line 6, enter "2018" to receive IRS tax information for the 2018 tax year that is required for the 2020-21 FAFSA.

The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.

Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.

- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.
- Submit the signed tax return transcript to CNU's Office of Financial Aid; make sure to include the student's name and student ID number on the transcript.

How to fix address matching problems when ordering online

The address matching system used by the IRS to log in to their system is very picky and it must match the address you have on file with them exactly. This is usually the address that was on your last taxes. We suggest that you have your taxes in front of you and copy that address carefully. For example, spelling out the word "street" rather than using the abbreviation "st." can be enough to cause an error in their system. The IRS.gov Website Help Desk can be reached toll-free at 1-800-829-1040, Monday - Friday 8:00 a.m. - 8:00 p.m. (Eastern Time).

Addresses are auto-corrected through a post office program and may not match what you put on the tax return.

If you have tried to enter your address as it appears on your taxes and it doesn't work you may need a standardized version of your address. **To get a standardized version of your address:**

Go to www.usps.com> Click Look Up a Zip Code > Enter Street Address, City, State>Click Find

Use the Standardized Version of your address to retrieve your Tax Return Transcript.