

## Directions for 2016 IRS Tax Filer Verification

You have been asked to verify your (and/or spouse's, if the student is married) and/or your parent(s)/stepparent's 2016 federal tax filer information. Below, please see the methods for submitting 2016 tax filer information to our office.

### **Method #1) IRS Data Retrieval Tool (DRT) – preferred**

The preferred method of updating your Free Application for Federal Student Aid (FAFSA) with your 2016 Federal Tax Return information is the IRS DRT. Returns filed electronically will be available to use the DRT 2-3 weeks after the return has been accepted by the IRS. Filers using a paper return will be available to use the DRT after the return has been received and processed by the IRS. In order to see if you qualify to use the DRT, please do the following:

- Log into your FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov).
- Select Make FAFSA Corrections.
- Navigate to the Financial Information tab.
- If you qualify to use the IRS DRT, enter your FSA ID and click Link To IRS. Click OK to continue.
- Once on the IRS website, enter all of your information correctly. Click Submit.
- Check the "Transfer My Tax Information into the FAFSA" box and click Transfer Now.
- Once completed, select OK and return to the FAFSA - make sure to electronically sign with all FSA IDs required.

### **Method #2) Request Tax Return Transcript ONLINE**

- It is available on the IRS website at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript).
- Click "Get Transcript ONLINE" and follow the directions. Please make sure pop-up blockers have been disabled.
- First Time Users will need to Register to use this service, otherwise Returning Users should LOG IN.
- Select Higher Education/Student Aid for the reason you are requesting a transcript. Click GO.
- Under Return Transcript, click "2016."
- If your pop-up blocker is off, you will be shown a copy of your Tax Return Transcript. Print your 2016 Tax Return Transcript to submit to our office with student's name and S# on each page.

### **Method #3) Request Tax Return Transcript online by MAIL**

- It is available on the IRS website at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript).
- Click "Get Transcript by MAIL" (Click OK for Authorized Use Box).
- Enter the primary tax filer's Social Security Number (or the IRS individual taxpayer identification 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 and click "Continue."
- In the Type of Transcript field, select "Return Transcript." In the Tax Year field, select "2016."
- 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 online request was successfully transmitted to the IRS. IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.
- If you are unable to use 'Get Transcript by MAIL' to retrieve a copy of your Tax Return Transcript – Please try the IRS automated phone transcript service at 1-800-908-9946 to receive your transcript by mail. Please allow 5-10 calendar days for delivery.

Additional information on obtaining a Tax Return Transcript is available at [www.irs.gov/taxtopics/tc156.html](http://www.irs.gov/taxtopics/tc156.html).