

## **IRS Data Retrieval Instructions:**

The Department of Education will **not** allow schools to accept *paper* copies of tax returns. The easiest way for you and/or your parents to access **completed** IRS tax return information and electronically transfer it to your FAFSA is through the IRS Data Retrieval. Parents who single, divorced, separated (proof of separation may be required) or married and filed joint tax returns are encouraged to use the IRS Data Retrieval to electronically transfer the IRS Tax Data to the financial aid application at [www.fafsa.gov](http://www.fafsa.gov). Parents who are married with a filing status of single or head of household must amend their tax returns to reflect either married filing jointly or separately by completing a 1040X tax return. Parents who amend their tax returns must notify the Office of Scholarships and Student Aid. Parents who are married with a filing status of married filing separately or who are unmarried and living in the same household must provide tax returns for both parents.

- **Students and parents should apply for a FSA ID and password.** The FSA ID is an electronic signature necessary for quick completion of the online process. To apply go to: <https://fsaid.ed.gov>
- **The Federal Tax Return must be filed with the IRS at least two weeks (if filing electronically) and 6 -8 weeks (if filing paper return) before using the FAFSA IRS Data Retrieval Process** to allow the IRS time to process the return.
- **Certain tax filers may not be able to use the IRS Data Retrieval and will need to request an IRS Tax Return Transcript**
  - To successfully use this option you must:
    - Have a federal tax return filed with the IRS.
    - Have a valid social security number.
    - Have a FSA Id and password
  - You will be **not** be able to use this option if:
    - Your marital status changes after December 31 of the same tax year.
    - You filed married filing separately.
    - You filed an amended return. If selected for verification, the following **2** documents must be submitted: a. IRS Tax Return Transcript (1-800-908-9946) and a completed copy of the Amended Paper Tax Return (1040X). Incomplete forms will not be accepted.
    - You filed a foreign tax return.

### **INSTRUCTIONS**

Step 1: Go to [www.fafsa.gov](http://www.fafsa.gov),

Step 2: select start here, login, enter student's FSA ID or student's information and click continue,

Step 3: select making corrections to a processed FAFSA,

Step 4: create a password, select next,

Step 5: select financial information,

Step 6: enter response to "For 2015, have you (student) or your parents completed their IRS income tax return" - **must be already completed to complete IRS Data Retrieval**

Step 7: select the appropriate response for your filing status,

Step 8: enter FSA ID for student or parent as requested & select Link to IRS,

Step 9: enter address and submit - *Note: address must be a perfect match from paper tax return*

Step 10: once verified click on "Transfer data now"

Step 11: continue to follow the instructions to transmit the IRS Data to the FAFSA. Successfully transferred data will have the following comment—"transferred from the IRS."

Step 12: Please submit your FAFSA. It will not be processed without submission.

**If you are unable to use this option, please follow the steps to obtain a tax transcript.**

## **How to Obtain a Free Tax Return Transcript from the IRS**

If your FAFSA is selected for verification, and you did not use the IRS Data Retrieval option or you changed the IRS data, you will be required to request a tax transcript from IRS and submit it to the Office of Scholarships and Student Aid. **Personal copies of tax returns can no longer be accepted.**

Three ways to request your Tax Transcript: by phone or by mail. Please make sure you request an IRS **Tax Return Transcript**. **DO NOT request a Tax Account Transcript or Record of Account** because they cannot be used for financial aid verification purposes.

### To order by Mail: **OPTION 1**

- Go to <http://www.irs.gov/Individuals/Get-Transcript>, then select: "Get Transcript by Mail"
- You must provide your SSN, Date of Birth, completed street address and Zip
- Select Type of Transcript - choose "Return Transcript" for "2015" and submit
- You should receive the following confirmation message "We have accepted your request for a 2015 Return Transcript. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you. If you need more than one copy of your transcript you are allowed to make copies for your personal records".
- Once received, forward a copy & include the student's NCCU Banner ID on ALL pages to NCCU, Office of Scholarships & Student Aid, P.O. Box 19496, Shepard Station, Durham, NC 27707.

### To order by phone: **OPTION 2**

- Call the IRS at 1-800-908-9946, then select the following prompts:
- Option 1 (For English)
- Enter and verify Social Security number (if joint return both SSN's required)
- Enter and verify number of street address
- Press 2 for Tax Return Transcript and indicate which year (i.e. 2015). Your transcript(s) will be mailed within 5 to 10 days from the IRS
- Once received, forward a copy & include student's BANNER ID on all pages to: NCCU, Office of Scholarships & Student Aid, P.O. Box 19496, Shepard Station, Durham, NC 27707

### Complete 4506-T Form: **OPTION 3**

- Form 4506-T is available online at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Request "Return Transcript for 2015"
- In Line 5 List: your current complete mailing address
- Mail completed form to: IRS, RAIVS Team, Stop 6705 P-6, Kansas City, MO 64999/ Fax# 855-821-0094
- Your transcript(s) will be mailed to you within 5 to 10 days from the IRS. Once received, forward a copy & include student's BANNER ID on all pages to: NCCU, Office of Scholarships & Student Aid, P.O. Box 19496, Shepard Station, Durham, NC 27707 or fax to 919-530-7959.

### **Get Transcript Online Tool – OPTION 4**

- Go to [www.irs.gov](http://www.irs.gov)
- Look under "Tools" tab and click "Get a Tax Transcript" and then "Get Transcript Online"
- Must have valid email address
- Must have a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name
- Must have specific financial account numbers (such as credit card number or an account number for a home mortgage or auto loan).  
**Note: The IRS Get Transcript Online registration process will not result in any charges to the card or to the financial account.**
- The IRS will send the user a confirmation code via email and an authentication code via text. The IRS email and text will contain a one-time code that the user will use to finalize the Get Transcript Online registration.  
**Note: IRS will never request log-in information or personal data via email or text.**
- If you are not able to successfully register the Get Transcript Online, you will be able to request a tax return transcript using one of the other options above.