

BridgeValley Community and Technical College Financial Aid Office

IRS Data Retrieval Tool Process

- 1) Log into FAFSA at www.fafsa.ed.gov
- 2) Select “Make FAFSA Corrections”
- 3) Navigate to the Financial Information section of the form.
- 4) Follow the instructions to determine if eligible to use the IRS Data Retrieval Tool
- 5) If eligible, transfer 2013 IRS tax information into the FAFSA.
 - You must use the tool and select the option to transfer the information into your FAFSA
- 6) Resubmit the FAFSA

If you are ineligible or decide not to use the IRS Data Retrieval Tool and the student’s FAFSA is selected for verification, you must follow the directions below to request an IRS Tax Transcript.

IRS Tax Return Transcript Request Process

1) PDF File Online Request

- Available on the IRS Web site at: <http://www.irs.gov/Individuals/Get-Transcript>
- You will need a valid email address to get your tax return transcript online
- Click “Get Transcript Online”
- If you do not already have an account, click “Create an Account”
- Creating an account will take several minutes
- Once you have successfully created your account click “continue”
- You will be taken to “Get Transcript”
- Choose a reason why you are requesting the Tax Return Transcript
- Choose the heading “Return Transcript” and the year “2013”.
- A PDF file of your Tax Return Transcript will be displayed. You can print this document and sign it.

2) Online Request Via Mail

- Available on the IRS Web site at: <http://www.irs.gov/Individuals/Get-Transcript>
- Click “Get Transcript Via Mail”
- Complete the required fields and click “continue”
- Choose “Return Transcript” under “Type of Transcript”
- Choose “2013” under “Tax Year” and click “continue”
- You should receive a message saying your tax return will be mailed in 5-10 days.
- Parents or students who filed “married filing jointly” must make the online mail request under the SSN and birth date of the primary tax payer.

3) 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 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 “**2013**”.
- 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.**

4) Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T. Download the form 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 tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. *note
- On line 6, enter “2013” to receive IRS tax information for the 2013 tax year that is required for the 2014-2015 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: 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.

*note: If using the paper form to have your IRS Tax Transcript mailed directly to the school, parents of dependent children should be aware that we may be unable to match your Tax Transcript to your dependent student, particularly if their last name differs from yours. We suggest you use the online request, add your dependent student’s name to the form and forward the form to the school.