

# Tax Data Retrieval Instructions

## 2018-2019 FAFSA Application

(Fall Semester Aug–Dec 2018; Spring Jan–May 2019; Summer June–July 2019)

All schools must verify FAFSA data with information provided directly from the IRS. If you and/or your parents have filed a **2016** U.S. Income Tax Return, you must retrieve your IRS data using one of the following two options. If you did not file see \*\*instructions below.

**Option 1: IRS Data Retrieval Tool (DRT)** - The easiest way to verify your FAFSA data with accurate tax information is by using the IRS Data Retrieval Tool. In a few simple steps, you may be able to view your tax information and transfer it directly into your FAFSA.

Certain tax filers will not be eligible to use the IRS Data Retrieval Tool.

- Log into [www.FAFSA.gov](http://www.FAFSA.gov) using your FSA ID. Students and Parents will need a separate FSA ID.
- Click **Make FAFSA Corrections** located in the middle of the page
- In the Financial Information section, click **Link to IRS**. Parents will need their FSA ID for this process.
- Transfer the Data
- Make sure to **Submit your FAFSA** after retrieval process is complete
- It will take 7–10 for our office to receive your updated FAFSA with the IRS Data Retrieval information
- If the IRS Data Retrieval Tool is not available to you, proceed to Option 2

If you are not able to utilize the DRT, you may want to request an IRS Tax Return Transcript in case selected for verification. SRJC does not want your Tax Return Transcript unless selected.

**Option 2: Tax Return Transcript** - If you or your parents chose not to use the IRS Data Retrieval Tool, or you are not eligible to use the tool, you must provide a **2016 Tax Return Transcript**. Tax filers can request a free transcript of their **2016** tax return from the IRS.

### On-line Request

- Visit [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript)
  - Click 'Get Transcript ONLINE' to receive transcripts for instant download
  - Click 'Get Transcript' by MAIL to receive transcripts via mail within 5–10 calendar days delivery to the address on your tax return
- If your address has changed since you filed your taxes you will need to use the Telephone or Paper Request method

### Telephone Request (5–10 calendar day delivery to the address on file)

Call the IRS by calling 1–800–829–1040 and select **Option 2,1,2** to request a Tax Return Transcript and then enter 2016 or  
Call the IRS Transcript Order line by calling 1–800–908–9946

### Paper Request (up to 10 business days to process request and send transcript to the specified address)

Go to <http://irs.gov/pub/irs-pdf/f4506tez.pdf> to download a paper form

**\*\*Did Not File and You Were Not Required to File** - To verify that you have not filed a tax return you will need to request a Verification of Non-Filing letter from the IRS. This letter must be dated after October 1, 2017. To request a Verification of Non-Filing letter from the IRS, complete Form 4506-T. On the form, request a 1040 in item 6 and checkmark items 6a, and 7. In item 9, enter the date 12/31/2016. The form will need appropriate signatures. Once you receive the Verification of Non-Filing letter from the IRS, you will need to provide our office with a copy.

**Amended Return** – If you amended your return you cannot use the IRS DRT, you must send all of the following:

- A tax transcript obtained from the IRS for tax year **2016**; and
- A signed copy of the IRS Form 1040X that was filed with the IRS.

**Victims of Identity Theft** - Individuals who are victims of IRS tax-related identity theft cannot use the IRS DRT and cannot obtain a transcript, they must submit to the institution:

- Please contact SRJC Financial Aid at (707) 527–4471 or email us at [financialaid@santarosa.edu](mailto:financialaid@santarosa.edu) to inform our office of your status.
- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, you must call the IRS Identity Theft protection unit at 1–800–908–4490 to obtain the TRDBV.
- A statement signed and dated by the tax filer indicating that they were victims of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

**Extension to File** – If you or your parent filed an extension to file taxes with the IRS, please contact our office at (707) 527–4471 or email [financialaid@santarosa.edu](mailto:financialaid@santarosa.edu)

Schools cannot accept copies of your IRS Tax Returns