Simple Steps to Transfer Tax Information Into Your FAFSA Form

FAFSA-IRS Data Retrieval Tool (DRT)

To use this option log into your FAFSA at https://studentaid.gov/ and do the following:

- select the correct FAFSA year
- scroll to the bottom and click on **Make Corrections**
- click on the **Financial Information** tab on top
- select the **FAFSA-IRS Data Retrieval** link

This will take you to the IRS website to verify your information. This process will link your IRS tax information to your FAFSA and if successful, PCC will not need to obtain a copy of your tax return transcript if your file is selected for verification.

How to Order a Tax Return Transcript
(Tax Account Transcripts will NOT be accepted)

A Tax Filer Can Obtain a Tax Return Transcript Online by visiting the IRS website. Simply go to

http://www.IRS.gov and click on *Get Your Tax Record* and then click on *Get Transcript Online*. This option allows the user to immediately receive an online PDF version of their IRS Tax Return Transcript or, if appropriate, a verification of non-filing. For authentication purposes, this option requires the user to register before submitting a transcript request.

To use this option, the user must have:

- access to a valid email address
- a text–enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name
- specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan)

During the registration process, 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 registration.

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 never request log-in information or personal data via email or text.

A Tax Filer Can Also Obtain a Tax Return Transcript by Mail, Paper or Phone

For requests by mail, visit http://www.IRS.gov and click on *Get Transcript by Mail*.

To use this option, the user must enter:

- their social security number
- date of birth
- street address and zip code
- the type of transcript (please select Return Transcript)
- the correct tax year of request

For requests by paper (or mail), go to http://www.IRS.gov and click on *Forms & Instructions* and then click on *Form 4506T* or *Form 4506T-EZ* (located in the middle of the page). Click **"open"** and the form will be made available. Complete all fields, print, sign, and fax or mail the form to the fax number and/or address listed on page 2 of the form.

For requests by phone, call 1-800-908-9946 and do the following:

- follow telephone prompts to verify the user's identity
- select **Option 2** for Tax Return Transcript.
- enter correct tax year of request

These request methods will result in the IRS mailing a paper transcript to the address on file with the IRS. Unless the tax filer has formally changed their address with the IRS (through the IRS change of address processes), the address on file with the IRS is the one used on the individual's last filed tax return.

Verification of Non-Filing: Individuals who did not file an IRS tax return for the relevant tax year will, if they

successfully register for *Get Transcript Online*, receive a PDF page indicating that the IRS has no record of a tax return being filed for the requested year. Individuals who are not able to successfully register to use the *Get Transcript Online* option will need to request a Verification of Non-Filing letter using the IRS Form 4506T. The letter is not available through the online *Get Transcript by Mail* or through the automated phone request process.