



A MEMBER OF THE MINNESOTA STATE COLLEGES & UNIVERSITY SYSTEM
AN AFFIRMATIVE ACTION EQUAL OPPORTUNITY EMPLOYER & EDUCATOR

Financial Aid Office
3300 Century Avenue North
White Bear Lake, MN 55110
Phone: 651-779-3305
Fax: 651-779-5816
E-mail: finaid@century.edu

Instructions for IRS Data Retrieval Tool

The IRS Data Retrieval Tool (DRT) is available to anyone that has e-filed their taxes at least two weeks earlier, or, in the case of paper filing, six to eight weeks earlier. You will **need to know** the address used to file your taxes as well as your filing status, found under the name/address section of your 1040 tax form. To ensure that you are using the correct address, you may want to go to www.USPS.com, click on "Look Up a ZIP Code," then type in your address to see it as it appears in the United States Postal Service database.

1. Log in to www.FAFSA.gov.
2. Click on "**Make FAFSA Corrections.**"
3. Click on "**Financial Information**" tab to reach the area where tax information is needed for student taxes. You need to be able to answer "No" to the series of questions at the top of the page. Once you do so, a blue "**Link to IRS**" button appears. If you are unable to answer "No" to the questions, please follow instructions on the back of this form to get a Tax Return Transcript from the IRS.
4. Click the "**Link to IRS**" button. A pop-up window will inform you that you are being taken to another website. Click "**Continue**" to land at the IRS Data Retrieval Tool.
5. This screen will have your name and social security number. You will be asked for your filing status and the address you used on your taxes. Be precise as this information needs to match for the transfer to go through.
6. If the information matches, two options will appear at the bottom of the screen. The top option will transfer your tax information directly from the IRS into your FAFSA. The bottom option will decline the transfer.
7. Click the top option to transfer your tax information and click "**Submit.**"
8. You will be redirected to the FAFSA where your tax information is now filled in. You will know that the transfer was successful if you see "Transferred from the IRS" next to the answer boxes. Do not change any of the transferred data.
9. Click "**Next**" at the bottom of the page.
10. Resubmit your FAFSA by clicking "**Submit.**" The corrections will not be done until the FAFSA is submitted. The corrections will arrive in the Financial Aid Office approximately a week later.

If Parent Information is required on your FAFSA, go back to Step 3, click on the Parent Information tab, then proceed through the remaining steps.

****If you are unable to complete these steps for any reason, please see instructions on the back of this page for Other Options for Obtaining an IRS Tax Return Transcript****

Other Options for Obtaining an IRS Tax Return Transcript

Tax filers can request a **Tax Return Transcript**, free of charge, of their past tax returns. When completing any of the below options submit your tax return transcript to our Financial Aid Office (contact information on reverse side). Make sure to include the student's name and ID number on the transcript.

Online Request:

Option 1 – Immediately view and print your transcript:

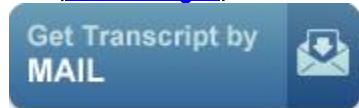
- (www.irs.gov) – In the **Tools** section of the home page, click “Get Transcript of your Tax Records.”



- If you have not already created an account you will need to do so.
 - Enter the tax filer's First name, Last name, Email, and confirm email- an email confirmation code will be sent to you (may take a few minutes) enter code then click verify confirmation code.
- Enter the tax filer's Social Security 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. (However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.)
- You will need to create username, password, and answer a series of verification questions.
- Once signed in: specify reason for request “Higher Education/Student Aid” this will highlight Return Transcript
 - For the 2014-2015 academic year, select the 2013 tax year
 - For the 2015-2016 academic year, select the 2014 tax year
- Return transcript will load- you will then need to print, and submit to the Financial Aid office.

Option 2 – Transcript by Mail:

- (www.irs.gov) – In the **Tools** section of the home page, click “Get Transcript of your Tax Records.”



- Enter the tax filer's Social Security 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. (However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.)
- Click “Continue”
- In the **Type of Transcript** field, select “Return Transcript” and select the appropriate tax year.
 - For the 2014-2015 academic year, select the 2013 tax year
 - For the 2015-2016 academic year, select the 2014 tax year
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript mailed to the address included on their online request, within **5-7 business days** from the time the on-line request was successfully transmitted.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

Telephone Request:

- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS
- Available from the IRS by calling **1-800-908-9946**
- Tax filers must follow prompts to enter their Social Security Number and the number in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. (However, if an address change has been completed through the US Postal Service, the IRS may have an updated address on file.)
- Select “**Option 2**” to request an IRS Tax Return Transcript, and select the appropriate tax year.
 - For the 2014-2015 academic year, select the 2013 tax year
 - For the 2015-2016 academic year, select the 2014 tax year
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript mailed to the address that was used in their telephone request, within **7-10 business days** from the time the IRS receives the request.