

Instructions to obtain Tax Information for the FAFSA Verification

Parent and student need to either use the IRS Data Retrieval Tool on the FAFSA to transfer tax information into the FAFSA **OR** request an IRS Tax Return Transcript from the IRS and send it to Dordt College. The following instructions apply to both parent and student, if parent and student filed a tax return for **2016**.

Instructions for using the IRS Data Retrieval Tool on the FAFSA

1. Login to student's FAFSA
2. Click on "Make FAFSA Corrections"
3. Click on the "Financial Information" tab at the top
4. Be sure that you select "Already completed" for tax return status. *If you have not filed your income tax form or paid your tax liability in full you will not be able to use this IRS Data Retrieval Tool until those are completed. It takes about 3-4 weeks from the time income tax information has been filed until this IRS Data Retrieval Tool will be able to transfer tax information.*
5. Answer the questions that are presented. If any of the answers are "yes" you will not be able to use the IRS Data Retrieval Tool.
6. If you answer all the questions with a "No" you will be asked if you want to go to the IRS webpage so you can transfer your tax information. Click on the "Link to the IRS" button. This will take you off the FAFSA webpage and to the IRS website.
7. You will need to enter information on the IRS site to find your tax information. Once that is retrieved you will be asked if you want to transfer tax information to the FAFSA.
8. After your tax information has been transferred continue through the FAFSA and be sure to **submit** it again. Do not change any information on the FAFSA once you have transferred the tax information from the IRS.
9. Dordt College will receive an updated FAFSA showing the transfer of tax information was successful.

Instructions for requesting a Tax Return Transcript from the IRS

You only need to get a transcript if you are choosing **not to** use the IRS Data Retrieval Tool on the FAFSA. If you have not filed your income tax form or paid your tax liability in full you will not be able to obtain a transcript. The transcript will be sent to the address on the tax return and then needs to be submitted to the Dordt College Financial Aid Office.

Option 1: Phone

- Call the IRS and request a transcript at 1-800-908-9946
- Enter the information requested using only the house number of your address
- Select "Option 2" which is the tax return transcript, **not** the account transcript
- Enter the correct tax year - **2016**

Option 2: Order Online

- Go to www.irs.gov
- Click on "Get a transcript of your tax records"
- Click on "Get a transcript by Mail"
- Enter required information to have a tax **return** transcript sent to the address on your tax return. This information needs to be completed for the person listed first on the tax return.

You can use other options on the IRS website if you prefer. Ordering by phone or online are the two simplest ways to receive a tax return transcript.

If you need more instructions, there are some good informational Youtube tutorials. Do a search using "IRS Data Retrieval" on www.youtube.com