

## Instructions for Providing Tax Data for Verification:

There are two ways that families can elect to provide their tax information for the purposes of Verification. If you are eligible to do so, the preferred method is to use the **IRS Data Retrieval Tool**. This tool links the information on your tax return to the FAFSA. Please note that if you recently filed your taxes or if you currently have an unpaid balance with the IRS, the retrieval tool may not be available to you.

Alternatively, families who are unable to use the Data Retrieval Tool may **contact the IRS to order a Tax Return Transcript**. You can request the transcript online, over the phone, or in person at your local IRS branch. Please be sure to request the “Tax Return Transcript” and not the “Tax Account Transcript” when communicating with the IRS. Once processed, the IRS will mail the transcript to you directly. It usually takes about 10 days for them to process and mail the transcript. You may receive the transcript sooner by visiting your local IRS branch and requesting the transcript in person.

Please note that IRS data is available approximately two weeks after filing taxes electronically or eight weeks after mailing a paper return. In addition to your tax data, the school will require a copy of your W-2s and/or Schedule C. We do not need a copy of your federal or state tax return however we may request additional information after reviewing your tax data.

## Instructions for Using the IRS Data Retrieval Tool

- Go to [www.FAFSA.gov](http://www.FAFSA.gov)
- Log into the student’s FAFSA.
- Select “Make FAFSA Corrections.”
- Under the Financial Information sections, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool.
- You will be redirected to the IRS website to authorize the transmittal.
- Be sure to save and submit the updated FAFSA.

## Instructions for ordering a Tax Return Transcript

- Go to [www.IRS.gov](http://www.IRS.gov) or call 1-800-829-1040
- Click on “Order a Return or Account Transcript.”
- Select “IRS Tax Return Transcript.” (Note: Do not select “Tax Account Transcript.”)
- You will need your social security number, date of birth, and the address on file with the IRS.
- It takes up to two weeks for IRS income information to be available for electronic tax return filers and up to eight weeks for those who’ve filed paper returns.

