

# Instructions for IRS Data Retrieval or Tax Return Transcript

If selected for verification, federal regulations require transferring your income tax information by using the IRS Data Retrieval Tool available on the FAFSA website at <https://fafsa.ed.gov/> or by submitting Tax Return Transcripts to Elizabethtown College.

If any of the following statements are applicable, you are **NOT ELIGIBLE** to use the IRS Data Retrieval Tool; therefore, you must submit a Tax Return Transcript to Elizabethtown College.

- My tax filing status is Married Filing Separately
- I filed an Amended Tax Return
- I filed a Puerto Rican or foreign tax return

## IRS Data Retrieval Process

The IRS Data Retrieval Tool is not available until two weeks after submitting your tax return electronically or up to eight weeks after submitting a paper tax return to the IRS.

**My FAFSA**  
Welcome,  
2013-2014 2012-2013

**Current Application Status: Processed Successfully**  
Congratulations, your FAFSA was successfully processed.

**What Happens Next**

- Your FAFSA information was made available to the school(s) you listed on your FAFSA
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

[VIEW PROCESSED INFORMATION \(PDF VERSION\)](#)  
[VIEW PROCESSED INFORMATION \(HTML VERSION\)](#)

**Original Application**  
Submitted: 02/25/2013  
Processed: 02/26/2013

**Latest Correction**  
Submitted: 02/28/2013  
Submitted By: Student  
Processed: 02/28/2013

You can also:  
• [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA.

1. Go to <https://fafsa.ed.gov/>
2. Log in to the student's FAFSA application
3. Select "Make FAFSA Corrections" and navigate to the parent Financial Information tab
4. Answer the questions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS tax information into the student's FAFSA.
5. If eligible, the parent will be asked to enter their FSA ID
6. Follow the online instructions to complete the IRS Data Retrieval process: Check box to Transfer My Tax Information into the FAFSA and then click Transfer Now.
7. Repeat process for Student Financial Information if the student filed a tax return for 2015.
8. Submit your correction by going to the Sign and Submit tab. Agree, sign, and enter FSA IDs for student and parent of Dependent students, if applicable.

**Internal Revenue Service**  
United States Department of the Treasury

**Federal Income Tax Information**

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers
Tax Year	2011	
Name (s)	Joe	
Social Security Number	***-**-****	
Filing Status	Married Filing Joint	
Type of Tax Return Filed	1040	Question 34 on the FAFSA
Adjusted Gross Income	\$	Question 36 on the FAFSA
Income Tax	\$3,400	Question 37 on the FAFSA
IRS Exemptions	2	Question 38 on the FAFSA
Education Credits	\$2,500	Question 46a on the FAFSA
IRA Deductions and Payments	\$2,500	Question 47b on the FAFSA
Tax-Exempt Interest Income	\$2,500	Question 47d on the FAFSA
Untaxed IRA Distributions	\$2,500	Question 47e on the FAFSA
Untaxed Pensions	\$2,500	Question 47f on the FAFSA

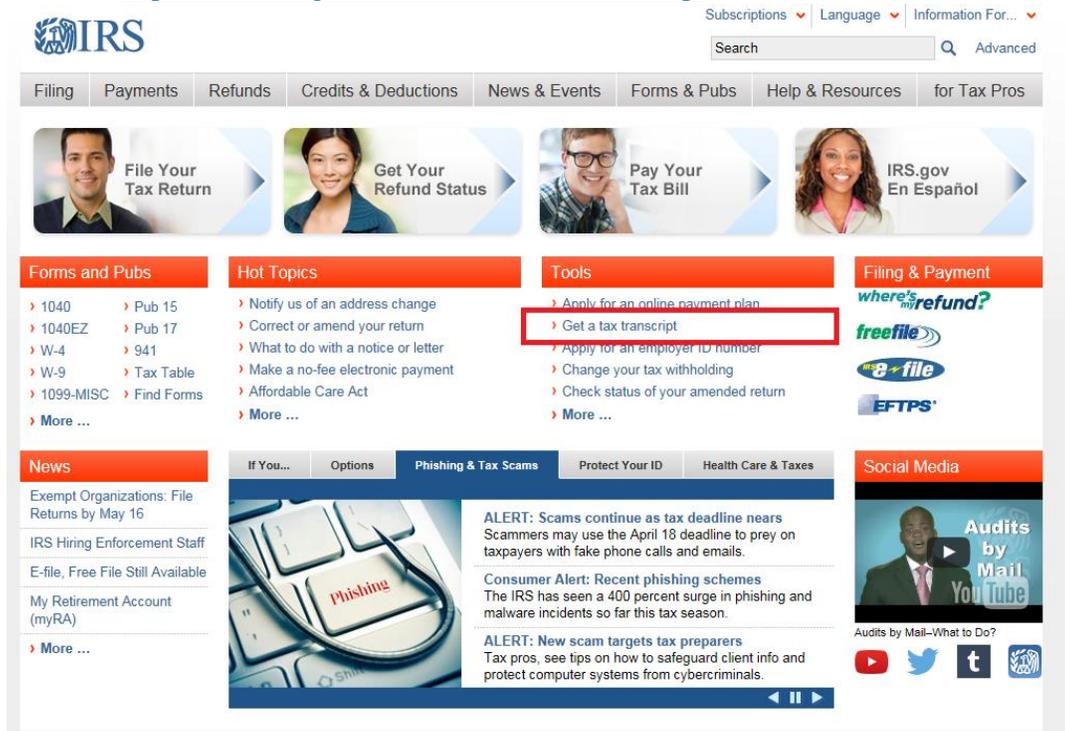
**Transfer My Tax Information into the FAFSA**  
The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and return you to FAFSA on the Web. Check this box if you are choosing to transfer your information.  
[Print this page for your records before clicking the "Transfer Now" button.](#)

**Do Not Transfer My Tax Information**  
By clicking the "Log Out" button, you are choosing not to transfer your tax information electronically. You may still use this tax information to input the data into your FAFSA application.  
[Print this page for your records before clicking the "Log Out" button.](#)

[Transfer Now](#) [Log Out](#)

# How to Request a Tax Return Transcript Online

1. Go to <http://www.irs.gov/Individuals/Get-Transcript>



The screenshot shows the IRS website interface. At the top, there are navigation links for Subscriptions, Language, and Information For... Below that is a search bar and a navigation menu with categories like Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. A row of four buttons offers: File Your Tax Return, Get Your Refund Status, Pay Your Tax Bill, and IRS.gov En Español. Below this are four main sections: Forms and Pubs, Hot Topics, Tools, and Filing & Payment. The 'Tools' section has a red box around the 'Get a tax transcript' link. Other sections include News, Social Media, and a Phishing & Tax Scams alert.

2. Click “Get Transcript by Mail.”

3. Read and agree to the IRS terms.

4. Follow prompts.

5. After successfully validating your information, you may expect to receive the IRS Tax Return Transcript within 5-10 days from the time the online request was made.

## How to Request a Tax Return Transcript by Phone

- Available from the IRS by calling 1-800-908-9946
- Tax filers must follow prompts to enter their Social Security number and the numbers 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 U.S. Postal Service, the IRS may have the updated address on file.
- Select Option 2 for Tax Return Transcript request and enter the year you are requesting.
- If successfully validated, you can expect to receive the IRS Tax Return Transcript at the address that was used in the telephone request, within 5-10 days from the time the IRS receives the request.

Questions? Contact us for more information.

Financial Aid Office  
Elizabethtown College  
(717) 361-1404  
[finaid@etown.edu](mailto:finaid@etown.edu)

