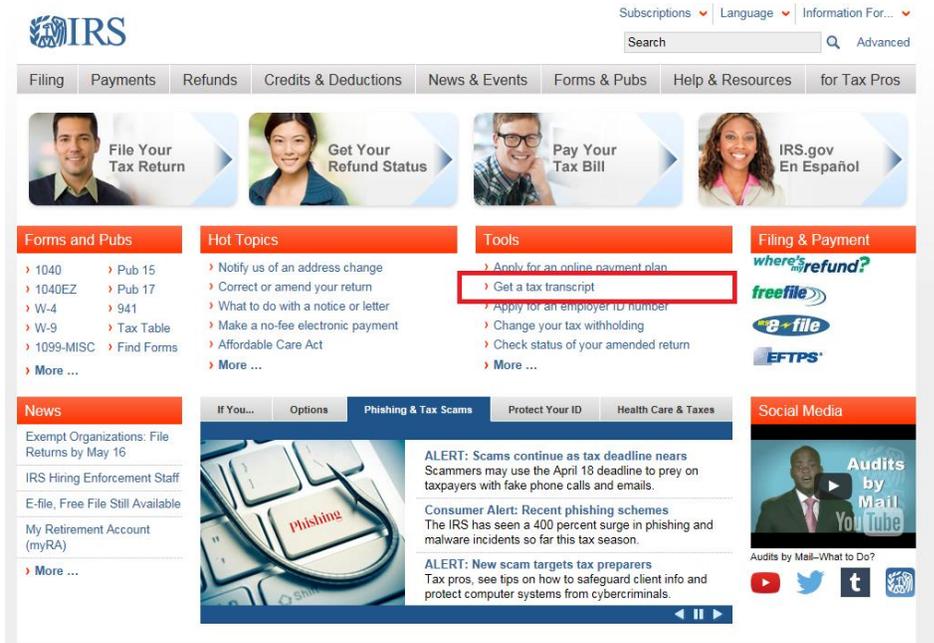


Instructions for Ordering a Tax Return Transcript or Using the Data Retrieval Tool on the FAFSA

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.

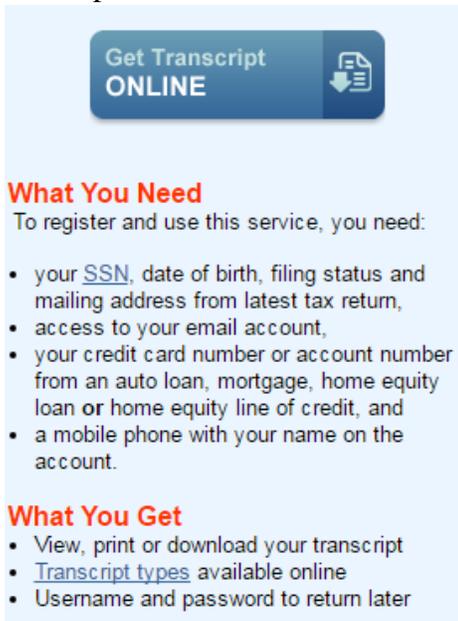
How to Request a Tax Return Transcript Online:

1. Go to <https://www.irs.gov/individuals/get-transcript>



The screenshot shows the IRS website homepage. At the top, there is a navigation bar with links for Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. Below this is a search bar and a 'Subscriptions' dropdown. The main content area is divided into several sections: 'Forms and Pubs', 'Hot Topics', 'Tools', 'Filing & Payment', 'News', and 'Social Media'. The 'Tools' section is highlighted with a red box, and the option 'Get a tax transcript' is selected. Other options in the 'Tools' section include 'Apply for an online payment plan', 'Apply for an employer ID number', 'Change your tax withholding', and 'Check status of your amended return'. The 'News' section contains several articles, including 'Exempt Organizations: File Returns by May 16' and 'E-file, Free File Still Available'. The 'Social Media' section features a video titled 'Audits by Mail - What to Do?'.

2. Click “Get Transcript Online.”



The screenshot shows the 'Get Transcript ONLINE' button, which is a blue button with a white document icon and a downward arrow. Below the button is the 'What You Need' section, which lists the requirements for using the service. The requirements are: your SSN, date of birth, filing status and mailing address from latest tax return, access to your email account, your credit card number or account number from an auto loan, mortgage, home equity loan or home equity line of credit, and a mobile phone with your name on the account. Below this is the 'What You Get' section, which lists the benefits of using the service: View, print or download your transcript, Transcript types available online, and Username and password to return later.

Get Transcript ONLINE

What You Need
To register and use this service, you need:

- your [SSN](#), date of birth, filing status and mailing address from latest tax return,
- access to your email account,
- your credit card number or account number from an auto loan, mortgage, home equity loan or home equity line of credit, and
- a mobile phone with your name on the account.

What You Get

- View, print or download your transcript
- [Transcript types](#) available online
- Username and password to return later

3. Click Get Started under First Time Users.
4. Read the registration information and click Continue.
5. Confirm that you have the required personal information available and click Yes.

Please have the following information and materials to complete registration:

- Full Name
- Email
- Birthdate
- Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
- Tax filing status
- Current address

Do you have this information available?

6. Confirm that you have the account number from a financial account listed on your credit report and click Yes.



You need a financial account to register

To verify your identity, we will need a number from ONE of your financial accounts. We can use any of the following:

- Credit Card **OR**
- Mortgage or Home Equity Loan **OR**
- Home Equity Line of Credit **OR**
- Auto Loan

You will only need to provide the loan account number or a few digits from a credit card number. We only use this information to verify your identity. **You will not be charged any money and are not sharing any account balances or other financial information with us.**

A soft inquiry will show up on your credit report to let you know that the IRS accessed your credit report information. This will not increase or decrease your credit score and lenders will not be able to see this.

If you have placed a credit security freeze with Equifax, you must contact Equifax to have the freeze temporarily removed before continuing. Once registration is complete, you may contact Equifax to resume the freeze.

Do you have this financial information available? (If you don't have the account information on hand, you should answer 'No'.)

7. Confirm that you have a mobile phone number and click Yes.
8. Enter your First Name and Last Name as they appear on your most recent tax return. Then enter your e-mail address and click Send Code.

9. The IRS will e-mail you an 8-digit code.
10. Enter your personal information and address information and click Continue.
11. Enter the account number for one of the choices listed and click Continue.
12. Enter your mobile phone number and click Send Message.
13. The IRS will text you a 6- digit code. Enter the code and click Continue.
14. Create your User Profile by entering a username and password. Then enter a phrase and select an image that you will recognize. Then click Continue.
15. After your user profile is created click Continue.
16. Read the Security Announcement and click Continue.
17. Select Higher Education/Student Aid from the drop down list and click Go.
18. In the Return Transcript box, click the year for the tax return transcript you want to download.

Get Transcript

Select a reason you need a transcript:

You selected: **Higher Education/Student Aid**
We suggest you download: **Return Transcript**

Below are the transcripts and years available.

Return Transcript
2015
2014
2013
2012

Record of Account Transcript
2015
2014
2013
2012

Account Transcript
2015
2014
2013
2012

Wage & Income Transcript
2015
2014
2013
2012

Show All

Show All

Glossary

Return Transcript
Tax Return Transcripts show most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. This transcript does not reflect any changes you, your representative or the IRS made after you filed your return. In many cases, a Return Transcript will meet the requirements of lending institutions offering mortgages and student loans.

Record of Account Transcript
Record of Account Transcripts combine the information from tax account and tax return transcripts.

Account Transcript
Tax Account Transcripts provide any adjustments either you or we made after you filed your return. This transcript shows basic data, including marital status, type of return filed, adjusted gross income and taxable income.

19. Congratulations! Your tax return transcript will appear in a new window.

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.
- 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.

How to use the IRS Data Retrieval Tool on the FAFSA:

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" if you have already submitted your FAFSA. Then navigate to the Financial Information tab

- Click on the “Financial Information” tab. Select “Already Completed” for the tax return filing status and answer the eligibility questions.

Federal Student Aid | PROUD SPONSOR of the AMERICAN MINDSM | **FAFSASM**
Free Application for Federal Student Aid

Help [SEARCH]

Student Demographics | School Selection | Dependency Status | Parent Demographics | **Financial Information** | Sign & Submit | Confirmation

Student Tax Information

Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?
Already completed

For 2015, what is your tax filing status according to your tax return?
Married-Filed Joint Return

To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):

Did you file a Form 1040X amended tax return?
 Yes No

Did you file a Puerto Rican or foreign tax return?
 Yes No

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
 Yes No

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address [Forgot Username](#)

FSA ID Password [Forgot Password](#)

LINK TO IRS

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?

If you filed your taxes electronically within the last three weeks, or by mail within the last eleven weeks, select **Yes**; otherwise, select **No**.

If you filed your taxes within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#); however, if you are not able to transfer your tax return information into your FAFSA at this time, you can try again in a week or two or you can manually enter your tax return information.

- If you are eligible to use the IRS Data Retrieval Tool, you can now click on the LINK TO IRS button. If you are not eligible to use the IRS Data Retrieval Tool, follow the instructions above to order a tax return transcript by phone, online at IRS.gov, or by mail.
- Click “OK” to leave the FAFSA website and enter the IRS Data Retrieval Tool website.
- Click “OK” to accept the IRS Data Retrieval Tool terms of use.

8. Enter the requested information and click “Submit.” Remember to enter your address exactly as it appeared when you filed your taxes.

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2015 Federal Income Tax Return. [?](#) Required fields *

First Name *	Dependent
Last Name *	Data
Social Security Number *	*** - ** - [redacted]
Date of Birth *	01 / 01 / 1994
Filing Status * ?	Single
Address - Must match your 2015 Federal Income Tax Return. ?	
Street Address *	
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	
Country *	United States
City, Town or Post Office *	
State/U.S. Territory *	Select One
ZIP Code *	

Select the button below to exit the IRS system and return to your FAFSA. By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

[Return to FAFSA](#) [Submit](#)

9. Review the information that the IRS has retrieved from your tax return. Check the box to “Transfer My Tax Information into the FAFSA” and click “Transfer Now.” Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.

Student 2015 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	2015	
Name(s)	Dependent Data	
Social Security Number	*** - ** - [redacted]	
Filing Status	Single	Question 34 on the FAFSA
Type of Tax Return Filed	1040EZ	Question 33 on the FAFSA
Adjusted Gross Income	\$9,750	Question 36 on the FAFSA
Income Earned From Work ?	\$20,125	Question 39 on the FAFSA
Income Tax	\$7,025	Question 37 on the FAFSA
IRS Exemptions	5	Question 38 on the FAFSA

[Print this page for your records before choosing an option below.](#)

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 you will return to your FAFSA. Check this box if you are choosing to transfer your information. [Transfer Now \[?\]\(#\)](#)

Do Not Transfer My Tax Information and Return to the FAFSA [?](#)

By clicking the “Do Not Transfer” button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA. [Do Not Transfer \[?\]\(#\)](#)

10. Do not update any answers that say “Transferred from the IRS” or we may require you to supply additional documentation. Answer the additional questions and click “Next.”

The screenshot shows the FAFSA application interface. At the top, it says "Federal Student Aid" and "FAFSA® Free Application for Federal Student Aid". Below this is a navigation bar with tabs: "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Financial Information" tab is selected. The main content area is titled "Student Financial Information" and contains a confirmation message: "You have successfully transferred your 2015 IRS tax information. Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with 'Transferred from the IRS.'" Below this, there are two questions: "What income tax return did you file for 2015?" with a dropdown menu showing "IRS 1040A or 1040EZ" and "Transferred from the IRS"; and "What was your adjusted gross income for 2015? This amount is found on IRS Form 1040A-line 21 or 1040EZ-line 4." with a text input field showing "\$ 9,750.00" and "Transferred from the IRS". There are also buttons for "PREVIOUS" and "NEXT". At the bottom, there are buttons for "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT". On the right side, there is a "Help and Hints" section titled "Student's Type of 2015 Tax Form Used Question 33" with instructions and a list of options: "IRS 1040", "IRS 1040A or 1040EZ", "A foreign tax return", and "A tax return for a U.S. territory or a Freely Associated State (including Puerto Rico)".

NOTE: If you are a Dependent student using the IRS Data Retrieval Tool for both the student and parent, you will have to complete this process twice, once under the Student Financial Information Section (blue tab) and once under the Parent Financial Information section (purple tab) before submitting the FAFSA using both FSA IDs.

11. Continue to the “Sign & Submit” tab. Follow all of the instructions carefully to submit your FAFSA correction.

Sign With an FSA ID

Parent Signature - Sign With an FSA ID

Mother's/Stepmother's Social Security Number
XXXX-XX-XXXX

Mother's/Stepmother's last name
XXXXXX

Mother's/Stepmother's date of birth
MM/DD/YYYY

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked:

1. to provide information that will verify the accuracy of your completed form
2. to provide U.S. or state income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

I, the parent, agree to the terms outlined above.

Agree Disagree

What is your (the Mother's/Stepmother's) FSA ID?

FSA ID Username or Verified E-mail Address
Create an FSA ID
Forgot Username

FSA ID Password
Forgot Password

SIGN

Student Signature - Sign With an FSA ID

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same

I, the student, agree to the terms outlined above.

Agree Disagree

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address
Create an FSA ID

FSA ID Password

SIGN

PREVIOUS **SUBMIT MY FAFSA NOW**

Help and Hints

Terms of Agreement - Parent

In order to submit your FAFSA, your parent must review the Terms of Agreement and select **Agree**.

[More>>>](#)

Remember to print or save the confirmation page for your records.

Questions? Contact us for more information.

Financial Aid Office
Elizabethtown College
(717) 361-1404

finaid@etown.edu

