

Instructions for Using the IRS Data Retrieval Tool or Obtaining an IRS Tax Return Transcript/Non-filer

If you were selected for verification, you must obtain your tax information directly from the IRS. If you filed a tax return, you are strongly encouraged to use the IRS Data Retrieval Tool as it is the most efficient option.

IRS Data Retrieval Tool (DRT)

Once you have submitted your tax return, wait the appropriate length of time (2-3 weeks if filed electronically and 8-11 weeks if by mail) then follow these steps:

1. Go back to www.fafsa.gov, log into student's FAFSA record and select "Make FAFSA Corrections."
2. Go to the Financial Information section of the form.
3. If you are eligible to use the IRS Data Retrieval Process, click on "Link to IRS" and click "OK."
4. On the IRS Website, enter the requested information and click "submit."
5. Check the box to the left of the words "Transfer My Tax Information into the FAFSA," then click "Transfer Now."
6. You should then receive a message "You have successfully transferred your 2016 tax information".
7. **Be sure to finish going through all the steps and electronically sign (if dependent student, one of your parents also needs to electronically sign) and submit your FAFSA.**

IRS Tax Return Transcript

If you are unable to use the IRS Data Retrieval Tool or did not file a tax return, you can request a Tax Transcript/Non-filer statement by using the website @ www.irs.gov , by phone, or by mail. Through the IRS website, you may obtain this information immediately by establishing an account with the IRS. If this is not an option, the documents can instead be ordered through the website to be delivered by mail.

Order online with IRS Account (available @ www.irs.gov immediately as a PDF)

- a. Select "Get Your Tax Record" from the IRS home page
- b. Click on "Get Transcript Online"
- c. To establish an account, you will need the information below:
 - i. Personal information (full name, date of birth, Social Security number, current address and email)
 - ii. Tax filing status of most recent processed tax return
 - iii. Account number for one of the following: credit card (not American Express or debit card); mortgage or home equity loan; home equity line of credit; or auto loan

**The IRS will make a soft inquiry of your credit report to establish your identity. It will have no impact on your credit rating. If your credit is frozen with Experian, you will need to lift the freeze prior to establishing this account*

 - iv. A US based phone number, registered in your name and capable of receiving text messages (not prepaid)
- d. Once the account is established, select "Higher Education/Student Aid" from drop down
- e. For W2s, select "Tax **Return** Transcript" for 2016
- f. Print or save PDF to submit to the Financial Aid Office

Transcript/Non-filer statement by Mail (order online @ www.irs.gov and receive by mail in 5-10 business days)

- a. Select "Get Your Tax Record" from the IRS home page
- b. Click on "Get Transcript by MAIL"
- c. Enter your SSN, DOB, street address and zip code, then click submit
- d. Under "Type of Transcript" select "**Return** Transcript"
- e. For the 2018-19 FAFSA, select "2016" under "Tax Year", then click "Continue" to confirmation page

Order by Phone (order by phone and receive by mail in 5-10 business days)

- a. Call 1 800 908 9946
- b. Enter and verify your SSN
- c. Enter your street address
- d. Select Option #2 to request a **Return** Transcript
- e. For 2018-19 FAFSA, enter tax year "2016" and confirm

Order by Mail (order by mail or FAX and receive by mail)

- a. Complete the Form 4506-T: Request for Transcript of Tax Return (form is available on the college website) www.BristolCC.edu > Current Students > Financial Aid > Forms
- b. Mail or FAX to the address or FAX number on the form

Note regarding Amended Tax Return

You will need to submit the original IRS Tax Return Transcript, a **signed** copy of the 1040X Amended Tax Return that was filed with the IRS, AND a Tax Account Transcript showing the processed amendment. To order a Tax Account Transcript, please follow the instructions above but select "Tax Account Transcript" under type of transcript.

Note regarding Identity Theft

A victim of identity theft, who cannot obtain the IRS Tax Transcript, needs to call the IRS Identity Protection Specialist Unit at 1 800 908 4490. You need to request an alternate paper tax return known as the Transcript Database View.

IRS tax documents for your financial aid file can be delivered in person or mailed to:

Financial Aid Office Bristol Community College 777 Elsbree Street Fall River, MA 02720