

MARIST

The Department of Education has reinstated the IRS Data Retrieval Tool (DRT) for the 2018-2019 aid year. This tool will allow filed 2016 federal tax return data to be uploaded directly to the FAFSA from the IRS. We encourage this method as the easiest, most secure way to provide verified tax information. If the IRS Data Retrieval is not used, please follow the instructions below on how to obtain an official IRS Tax Return Transcript. (Signed copies of tax returns will no longer be accepted, per federal regulations).

How to Utilize the IRS Data Retrieval Tool (DRT)

- Go to <https://fafsa.gov>
 - Login using the *student's* FSA ID Username or email and FSA ID password. (**NOTE:** Login with the student's information first, even if the parent will use the IRS Data Retrieval).
 - Select the option to Make FAFSA Corrections.
 - Create a Save Key (password that allows the student to log back into the saved application- not the FSA ID).
 - Scroll to the Financial Information tab. The student may use the DRT on the Student Financial Information page. Parents need to click *Next* at the bottom of the screen to get to the Parent Financial Information section.
 - Ensure the 2016 tax status is marked *Already Completed* and the 2016 tax filing status is reported correctly.
 - As long as a Puerto Rican or foreign tax return was not filed, click on the blue button that reads *Link to IRS*.
 - Once on the *Get My Federal Income Tax Information* page, enter the address from the tax return and *Submit*.
 - Check the box that reads *Transfer My Tax Information into the FAFSA Form* and then the *Transfer Now* button.
 - Continue to the *Sign & Submit* tab and be sure the student and parent (if applicable) electronically sign the corrected application. Click the *Submit my FAFSA Now* button at the bottom of the page.
- PLEASE NOTE:** Marist will not receive the corrected application with a successful IRS Data Retrieval unless the updated FAFSA is successfully resubmitted on the *Sign & Submit* tab.

How to Request a 2016 IRS Tax Return Transcript

(only if the IRS Data Retrieval is not utilized)

- Go to <https://www.irs.gov/individuals/get-transcript>
- An option to *Get Transcript Online* or *Get Transcript by Mail* will be presented. Choose either option.
- Both options ask for personal information such as Social Security Number, Date of Birth, Address, etc.
 - ◊ Be sure to use the address currently on file with the IRS. Generally this will be the address listed on the latest filed tax return. However, updates are also received from the US Postal Service.
- Select a **Return Transcript** as the Type of Transcript and **2016** for the tax year.
- If the mail option is selected, the transcript will be sent to the address on file with the IRS within 5-10 calendar days. If the online option is selected, the transcript will appear on your screen. Ensure that any popup blockers are turned off so that the transcript can display.
- Once received, submit the Tax Return Transcript to the Office of Student Financial Services via email, fax or mail.
 - ◊ **PLEASE NOTE:** If the transcript is received via mail, it will have information printed on both sides of each page. Be sure to forward all pages (front and back) to Student Financial Services.