

## IRS Data Retrieval & Tax Return Transcript Information

The IRS Data Retrieval Tool allows students and parents to access the IRS tax return information needed to complete the FAFSA and also to provide tax information to the school if it is required for verification.

### Instructions for using the IRS Data Retrieval Tool

To get started:

- 1) Go to [www.fafsa.ed.gov](http://www.fafsa.ed.gov).
- 2) Click the Start Here button and log into the FAFSA
- 3) Select: Make changes to FAFSA
- 4) Enter your FSA ID username and password that you created when you first filed the FAFSA
- 5) Click on the Financial Information tab at the top of the screen
- 6) The first question will ask if you've completed an IRS tax return – select already completed
- 7) Select the appropriate tax filing status
- 8) If you select the None of the Above option, you will then need to:
  - a. Enter your FSA ID at the bottom of the screen and link to the IRS website
  - b. Enter the requested information and click Submit and then Transfer Now
  - c. Click OK to return to the FAFSA website
- 9) Dependent students will need to proceed to the Student Tax Information and repeat these steps if they have filed a tax return
- 10) Once the retrieval is complete, click on the Sign & Submit tab at the top of the screen and submit your corrections. Corrections will be sent to Malone within 3 business days.

***If you are NOT eligible to use the IRS Data Retrieval Tool you will need to submit a signed copy of your 2016 Federal 1040 Income Tax Return.***

### Non-filer Letter

You can order a Non-filer Letter from the IRS using one of the 2 options below.

- 1) To order your IRS Tax Return Transcript and receive it by USPS mail:
  - a. **Visit:** [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript)
  - b. Choose **Get Transcript by Mail**,
- 2) Order IRS Tax Return Transcript by Phone (USPS snail mail delivery)
  - a. **Call: 1-800-908-9946**
  - b. Press 1 for English or 2 for Spanish
  - c. Enter your Social Security Number
  - d. Press 1 to confirm your Social Security Number or 2 to enter it again
  - e. Enter the numbers in your street address
  - f. Press 2 to order a tax return transcript
  - g. Enter the year you are requesting a tax return transcript
  - h. Press 1 to confirm the year or 2 to enter a different year
  - i. Your transcript will arrive in 5 to 10 days via mail

If you are not able to obtain a Non-filer Letter from the IRS, please contact the Financial Aid Office at 330-471-8159 or [finaid@malone.edu](mailto:finaid@malone.edu).

**After receiving your transcript, make a copy and send it to the Financial Aid office that is requesting the tax transcript.**