

INSTRUCTIONS FOR USING THE IRS DATA RETRIEVAL TOOL

Here are the instructions for linking tax information into your FAFSA by using the **IRS Data Retrieval Tool**. It is **VERY HELPFUL** to have the first page of your US 1040, 1040A or 1040EZ on hand when you begin this process.

1. Go to www.fafsa.gov, click "Start Here" and log in using the student's FSA ID
2. Click "**Make FAFSA Corrections**" and create a Save Key
3. Choose "**Making corrections to a processed FAFSA**"
4. Click on the "**Financial Information**" tab
5. For the question "Have your parents completed their IRS income tax return" choose "Already Completed"
6. Answer the questions in the pop-up box. If all questions are answered "**No**" you are eligible to use the IRS Data Retrieval Tool.
7. Select answer to "which parent are you," enter parent's FSA ID and click "**Link to IRS,**"
8. Click "**OK**" to "Leaving FAFSA on the Web"
9. Click "**OK**" to the pop-up "This Gov't System is for Authorized Use Only"
10. Enter information requested (Filing Status, Address, etc.) and click "Submit" (**all information must match IRS records**)
11. Check "**Transfer my tax information into the FAFSA**" on the left of the page and click "**Transfer Now**" on the right
12. You will be directed back to the FAFSA webpage. At the "**List of Changes**", review, then scroll to bottom and click "**Next**".
13. Click "**Sign and Submit**" and follow instructions to submit the changes
14. You will receive a confirmation number and a confirmation email.

**Independent students will not need to submit parent information, but will follow the same steps for entering their own tax information.
Do not make any adjustments to the tax information once it has been transferred to the FAFSA. If any information is incorrect, please contact the Office of Financial Aid.

***** **OR** *****

INSTRUCTIONS FOR PRINTING/ORDERING TAX RETURN TRANSCRIPTS

If your FAFSA has been selected for verification and you are unable to use the IRS Data Retrieval Tool, please request a tax return transcript directly from the IRS.

1. Go to www.irs.gov/individuals/get-transcript.
2. Select either "Get Transcript Online" or "Get Transcript by Mail"

GET TRANSCRIPT ONLINE

**You will need access to a personal account number from a credit card, mortgage, home equity loan, home equity line of credit, or car loan to complete.*

1. Follow the online prompts to verify your identity through personal and financial information.
2. Create an account then select higher education/student aid as your reasoning for requesting the transcript.
3. Under the **RETURN TRANSCRIPT** box, choose the tax year. (Select two tax years prior - for example, for the 19-20 FAFSA, select the 2017 tax year; for the 2020-21 FAFSA, select the 2018 tax year.)

GET TRANSCRIPT BY MAIL

1. Enter your social security number, date of birth, and your tax return mailing address.
4. Select **RETURN TRANSCRIPT** and choose the tax year. (Select two tax years prior - for example, for the 19-20 FAFSA, select the 2017 tax year; for the 2020-21 FAFSA, select the 2018 tax year.)
2. Transcripts arrive in 5 to 10 calendar days at the address the IRS has on file.

**If we are requesting a Parent IRS Tax Transcript, your parent will follow the same steps to request their Tax Return Transcript. If student or parent filed separate from their spouse, these steps will need to be followed for BOTH parties.*

OTHER OPTIONS FOR ORDERING

Automated Phone System	By Mail or Fax	By Mobile App
1(800)908-9946	Complete Form 4506T-EZ	IRS2Go Mobile App (Request for Transcript by Mail) Download on Google Play or App Store
<ul style="list-style-type: none">• Enter your Social Security #• Enter the Numbers in your street address• Option 2 (Transcript of Tax Return)• Enter the year of the return requested	Mail to: RAIVS Team Stop 37106 Fresno, CA 93888 Fax: (559)456-5876	<ul style="list-style-type: none">• Verify your identity• Choose "Tax Return Transcript"• Enter the year of the return requested

Please retain any original copies mailed to you from the IRS for your records and submit a copy to the Office of Financial Aid. You may submit this by mail, email, or fax. Be sure to put your E# and name at the top of each form.

EASTERN ILLINOIS UNIVERSITY, OFFICE OF FINANCIAL AID AND SCHOLARSHIPS, 600 LINCOLN AVE, CHARLESTON, IL 61920
TELEPHONE 217-581-6405 FAX 217-581-6422 EMAIL finaidverification@eiu.edu