

How to Obtain Your Tax Return & W2 Transcripts

FIRST CHOICE: IRS DATA RETRIEVAL

1. Log on to www.fafsa.gov
2. Under the “Financial Information” section, you will be asked a series of questions to determine whether or not you (or your parents) are eligible to use the FAFSA/IRS data retrieval tool.
3. If eligible to use the FAFSA/IRS data retrieval tool, submit your PIN and “Link to IRS”
4. You will be directed to the IRS secure site to “Transfer Tax Information into the FAFSA”
Note: *When you login to retrieve your IRS data, your name and address information must exactly match the information on your tax return.*
5. A successful match will show on your FAFSA as “Transferred from the IRS”
Note: *Once IRS data is transferred, do not change any tax related information on the FAFSA*
6. Repeat the IRS data retrieval process so that both parent and student IRS data is transferred
7. Once you have transferred your IRS data; you are directed back to the FAFSA.
8. Submit your changes to FAFSA

YOU CANNOT USE THE FAFSA/IRS DATA RETRIEVAL TOOL IF:

- Your marital status changes after December 31 of the same tax year
- You filed an amended return
- You filed a Puerto Rican or foreign tax return
- You were not required to file a tax return
- (see Financial Aid for details)
- Your tax return filing status is Married, filing separately OR Head of household

If any of these apply to you, you must use the Second Choice—Tax Return Transcript

SECOND CHOICE: TAX RETURN TRANSCRIPT

1) Online

Go to www.irs.gov and click on *Order a Tax Return or Account Transcript*.

2) Call

(800) 908-9946 and follow the voice prompts.

3) Mail—

IRS Form 4506-T (or Form 4506-T-EZ), *Request for Transcript of Tax Return*.

IRS forms are available online at www.irs.gov or by calling

(800) 829-3676.

These transcripts are mailed to your Tax return address, free of charge.

SIGN YOUR TRANSCRIPTS!