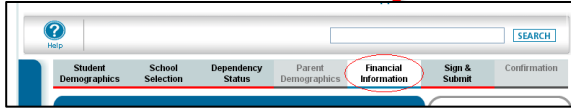
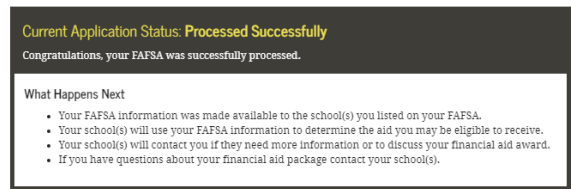


Step by Step Instructions for IRS Data Retrieval Tool --- PREFERRED METHOD

- ❑ Go on to the FAFSA website (www.FAFSA.gov).
Select “login”, enter requested data.
- ❑ On the **2020-21** FAFSA, select “Make FAFSA Corrections.”
- ❑ Enter your FSA ID and password.
- ❑ Then select the “Financial Information” tab.



- ❑ After you select “Already Completed” as your filing status, you must be able to answer “No” to the filtering questions.
- ❑ You will then be required to enter the FSA ID and password of the person whose tax information you will be transferring.
- ❑ Select “Link to IRS”



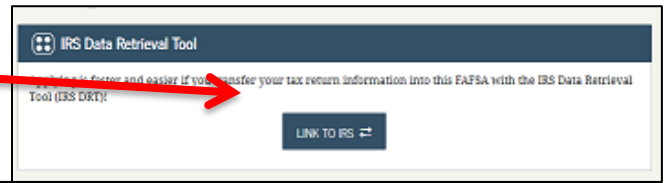
You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA
- [View Correction History](#) to view corrections made to your FAFSA
- [Create a shareable file with some of your student information using MyStudentData Download.](#)

For 2017, have you completed your IRS income tax return or another tax return? Already completed ▾

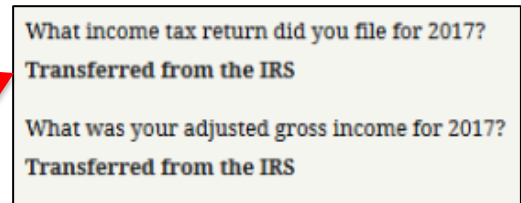
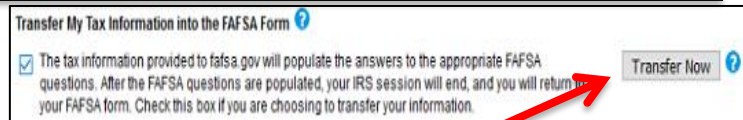
For 2017, what is your tax filing status according to your tax return? Married-Filed Joint Return ▾

Did you file a Puerto Rican or foreign tax return for 2017? Yes No



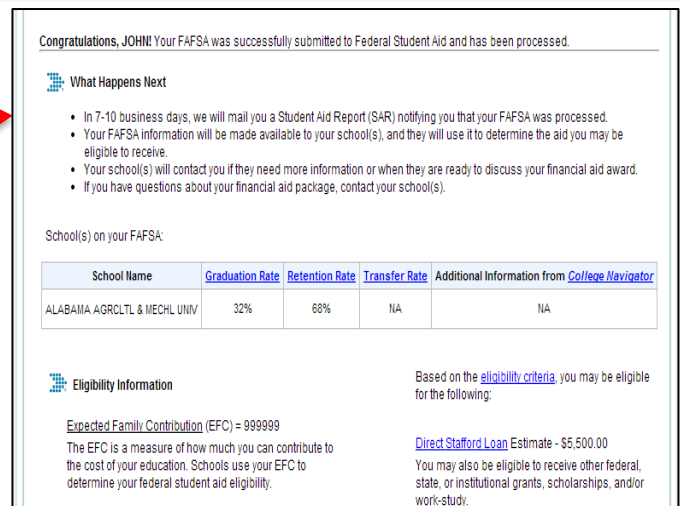
Once on the IRS website, enter all the information it asks.

- ❑ * **ENTER EVERYTHING EXACTLY THE WAY IT IS ON THE TAX RETURN, ESPECIALLY THE ADDRESS.***
- ❑ If the IRS validates your identification, your IRS tax information will be displayed. Select “Transfer My Tax Information Into the FAFSA”, then “Transfer Now.”
- ❑ **DO NOT STOP YET!**
- ❑ You will then be directed back to the FAFSA website.
- ❑ You must continue through the submission of the correction.
- ❑ Follow the same steps for the student or parent, if needing to link their tax information.
- ❑ The student or parent’s information is hidden from view.
- ❑ You should see the words “transferred from the IRS” in the data entry fields.



- ❑ Once you have transferred all the necessary tax information, proceed to “Sign & Submit.” Both student and parent must enter their FSA ID and password and submit, if changes were made to both sections.
- ❑ A “Confirmation Page” will signify the completion and submission of your corrections; print this page for your records.

Please note that once the FAFSA is submitted, it takes 3-5 business days for the Federal Processor to report it to the school. You will get a follow up letter from the IRS confirming your information has been accessed.



IRS Tax Return Request Process

Tax filers can request paper transcripts, free of charge for their 2018 tax return from the IRS in the following ways.

1. IRS Data Retrieval Tool (DRT): *Preferred Method*

- This is the fastest and easiest method.
- This method allows you to ‘retrieve’ your tax data from the IRS and ‘link’ it to the FAFSA.
- Detailed instructions can be found on the reverse of this form.

2. Your Federal Tax Return Packet:

- Review your tax return packet from your tax preparer. You will need to submit a **signed** copy of the 2018 IRS Form 1040 along with any schedules and W-2’s.

3. Telephone Request for a transcript:

- This will produce a copy of your tax return in a transcript version sent directly from the IRS to your address.
- Call the IRS directly at 1-800-908-9946.
- Press 1 for English, 2 for Spanish.
- Follow prompts to enter your social security number, and the numbers of your street address.
- Select **Option 2** for Tax Return Transcript, and enter year **2018**.

Please allow 5-10 days. The transcript will be sent to the address on file at the IRS.

4. IRS Office:

- Contact/Visit your local IRS office.
- On www.irs.gov, select “Contact Your Local IRS Office” in the bottom gray area on the main page.

Our Agency	Know Your Rights	Resolve an Issue
About IRS	Taxpayer Bill of Rights	Respond to a Notice
Work at IRS	Taxpayer Advocate Service	Independent Office of Appeals
Help	Accessibility	Identity Theft Protection
Contact Your Local Office	Civil Rights	Report Phishing
Tax Stats, Facts & Figures	Freedom of Information Act	Tax Fraud & Abuse

5. Online Request:

- Available at <https://www.irs.gov/individuals/get-transcript>
- Click “**Get Transcript Online**”, Log in or Create an account using the “Get Started” option.
- You will need access to information such as email address, birth date, social security number, tax filing status, current address, and mobile phone number.
- Enter the tax filer’s social security number, email address, filing status, account numbers for loan or credit card associated with your name, and mobile phone associated with your name to verify your identity.
- Click “Continue”
- Select "**Tax Return Transcript**" (**not** "Tax Account Transcript") and the Tax Year field, select "**2018**"
- If successful, you will be able to view your IRS Tax Return Transcript online.
- Print and send the tax return transcript to Chowan University – make sure to write the student’s name on the form.

6. Identity Theft Situation:

- If you have been the victim of Identity Theft, you must request a Tax Return Data Base View (TRDBV) transcript from the IRS by calling 1-800-908-4490 **and**
- Submit a signed statement indicating that you were a victim of tax-related identity theft and that the IRS has been made aware of it.

**Once you receive the tax return transcript; please send it to the Financial Aid Office. **

Transcripts can be emailed to finaid@chowan.edu, uploaded via the students Netpartner portal, or faxed to 252-398-6513.

Please remember to include the student’s name on all correspondence.