

Options to Fulfill Tax Transcript Requirement

Option 1:

IRS Data Retrieval Tool on the 2013-2014 FAFSA

1. Go to www.fafsa.gov, click “Start Here” and log in
2. Click “Make FAFSA Corrections” and enter PIN and password
3. Click “Financial Information”
4. For the question “Have your parents completed their IRS income tax return” choose “Already completed”
5. Choose the correct answer to the questions in the pop-up box. If “none of the above,” you are eligible to use the IRS Data Retrieval Tool.
6. Select answer to “Which parent are you,” enter parent’s PIN and click “Link to IRS,” click “OK”
7. Enter information requested (name, address, etc.) and click “Submit” (all information must match IRS records)
8. Check “Transfer my tax information into the FAFSA” and click “Transfer Now,” click “OK”
9. Repeat for student if the student has filed taxes
10. On FAFSA webpage, click “Sign and Submit” and follow instructions to submit the changes

* 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 Financial Aid Office.

Option 2:

Ordering a copy of Tax Return Transcript for 2013-2014

1. Go to www.irs.gov/Individuals/Order-a-Transcript and follow instructions for completing the request on line. This takes 7 to 10 business days for you to receive.
OR
2. Call the IRS at 1-800-908-9946 and follow the prompts to order a Tax Return Transcript for the individuals needed. This takes 7 to 10 business days for you to receive.
OR
3. You may be able to get a copy of your transcript in person at your local IRS Field Office. The person whose transcript is being requested has to be present (in other words, a student cannot go get their parents tax return transcript unless their parent is with them). The local Rochester IRS Field Office is located at 255 East Avenue, Rochester, NY 14604.