

## Directions for IRS Data Retrieval Tool, Tax Return Transcript Requests and Verification of Non-Filing (2022-2023)

Using the **IRS Data Retrieval Tool**, either when initially completing or correcting a FAFSA, provides students with the fastest, easiest, and most secure solution for meeting verification requirements.

### IRS Data Retrieval Tool Instructions:

- Go to [FAFSA.gov](https://fafsa.gov)
- Log in to the student's FAFSA record
- Select "Make FAFSA Corrections"
- Navigate to the Financial Information section of the form
- Follow the instructions to determine if the student (&/or parent) is eligible to use the IRS Data Retrieval Tool to transfer 2020 IRS income tax information into the student's FAFSA
- Electronically submit the corrected FAFSA (Bard College at Simon's Rock will receive the updated FAFSA within 3-5 business days)
- Electronic tax filers must wait approximately two weeks from their filing date to use IRS Data Retrieval
- Paper tax filers must wait approximately eight weeks from their filing date to use IRS Data Retrieval

Certain circumstances may prevent use of the IRS Data Retrieval Tool (married independent students or married parents of a dependent student filing separate tax returns). If you are unable to use the IRS Data Retrieval Tool, please see alternate instructions below.

### IRS Tax Transcript or Verification of Non-Filing Letter Instructions:

If the student (&/or parent) is unable or chooses not to use the IRS Data Retrieval Tool in their FAFSA on the Web, the student (&/or parent) must submit a **2020 IRS Tax Return Transcript**. **NOTE:** If an amended return was filed, request a 'Record of Account Transcript' OR a 'Tax Return Transcript' **AND** a 'Tax Account Transcript'.

#### **Online Request** (get transcript online or by mail)

- **Get Transcript ONLINE** – Go to [www.irs.gov](https://www.irs.gov), then click "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Get Transcript by MAIL** – Go to [www.irs.gov](https://www.irs.gov), then click "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request. Verification of Non-Filing letter not available using this method.

#### **Phone Request**

- 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

#### **Paper Request Form**

- Use IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.
- Non-Filing Letter: you can use form IRS form 4506, to request a non-filing letter from the IRS.