

Obtaining Tax Information

IRS Data Retrieval

The preferred method of obtaining tax information is to use the IRS Data Retrieval while doing the FAFSA or submitting corrections to the FAFSA.

To use the IRS Data Retrieval Tool: log into your FAFSA at www.fafsa.gov using your FSA ID. Select the option Make FAFSA Corrections. Select the Financial Information Tab; this will bring you to the financial portion of the FAFSA. From here, follow the instructions to determine if you are eligible to use the Retrieval tool. If the "Link to IRS" box appears you must enter in your demographic information identical to what you filed your taxes under.

Options to obtain an IRS tax return transcript (For financial aid verification, we need 2016 tax information)

By Mail

Go to www.irs.gov and select the option to **Get Your Tax Record**, then **Get Transcript by Mail**. You can elect to have the tax return transcript mailed to you in 5-10 business days.

If you choose to request a tax **RETURN** transcript by Mail you will be asked to provide your Social Security number and address that was used to submit your tax information. Remember this option takes between 5-10 business days.

Download PDF to Print Tax Transcript Immediately

Go to www.irs.gov and select the option to **Get Your Tax Record**, then **Get Transcript Online**. You will create an account and download a PDF file to print off immediately.

If you choose to create an account with the IRS you will need to verify your identity by providing a credit card number, home mortgage loan number, or an auto loan number. **You WILL NOT be charged, this is used to verify your identity.** Once you have created the account you can print off your tax return transcripts, wage transcripts, and/or verification of non-tax filing.

Request by Phone

You can call the IRS automated number at 1-800-908-9946 and request a **2016** tax return transcript (**option 2**) **not** a tax **account** transcript. This should be mailed to you within 5-10 business days.

Complete 4506-T Form to mail to IRS or Fax to IRS

You can submit the form 4506-T to the IRS to request a copy of your **2016** tax transcript, wage transcript, or verification of non-tax filing. This form can be obtained in the Financial Aid Office or by going to the IRS.gov website. For Michigan tax filers:

-You can mail this form to: Internal Revenue Service, RAIVS Team, Stop 37106, Fresno, CA 93888. (For non-Michigan filers, mail to address listed on the back of the form)

Or

-You can fax this form to IRS at 559.456.7227

***If you are married and you and your spouse filed separate tax returns, you must submit tax return transcripts for both you and your spouse.

Special Tax Circumstances

Amended Tax Returns

When an institution is aware that the tax filer filed, or will file, an **amended tax return** with the IRS, it **must obtain a signed copy of the 2016 IRS Form 1040X** .

Rollovers

Unless the rollover amount is subtracted by the tax filer, the income will be incorrectly overstated on the FAFSA. Once corrected, however, the ISIR will reflect that the IRS data was altered after it was retrieved.

Untaxed IRA distribution and pension or annuity payments.

A tax filer determines how much of his IRA distribution or pension or annuity payment is taxable when he completes his tax return. The applicant reports the untaxed portion, which is determined from the tax return, but should not include rollovers (transfers of funds from one IRA to another).

If the applicant notifies the school of a rollover, the school should obtain alternate tax documents as well as documentation of the rollover to complete verification. This can include a copy of the 1040 form or IRA documentation stating Rollover and the amount.

Victims of Identity Theft

1. Victims of Identity Theft who cannot get a tax return transcript must call the IRS's Identity Protection Specialized Unit (IPSU) toll-free number at 800-908-4490. After the IPSU authenticates the tax filer's identity, she can ask the IRS to mail her an alternate paper tax return transcript known as the TRDBV (Transcript DataBase View) that will look different than a regular transcript but that is official and can be used for verification.
2. Applicants must also submit a signed and dated statement indicating that they were victims of IRS tax-related Identity Theft and that the IRS has been made aware of the theft.