

IRS Data Retrieval Instructions:

The easiest way for you and/or your parents to access **completed** IRS tax return information and electronically transfer it to your FAFSA is through the IRS Data Retrieval. Parents who single, divorced, separated (proof of separation may be required) or married and filed joint tax returns are encouraged to use the IRS Data Retrieval to electronically transfer the IRS Tax Data to the financial aid application at <https://studentaid.ed.gov>.

Parents who are married with a filing status of single or head of household must amend their tax returns to reflect either married filing jointly or separately by completing a 1040X tax return. Parents who amend their tax returns must notify the Office of Scholarships and Student Aid. Parents who are married with a filing status of married filing separately or who are unmarried and living in the same household must provide tax returns for both parents.

- **Students and parents should apply for a FSA ID and password.** To apply go to: <https://fsaid.ed.gov>
- **The Federal Tax Return must be filed with the IRS at least two weeks (if filing electronically) and 6-8 weeks (if filing paper return) before using the FAFSA IRS Data Retrieval Process** to allow the IRS time to process the return.
- **Certain tax filers may not be able to use the IRS Data Retrieval and will need to request an IRS Tax Return Transcript**
 - To successfully use this option you must:
 - Have a federal tax return filed with the IRS.
 - Have a valid social security number.
 - Have a FSA Id and password
 - You will be **not** be able to use this option if:
 - Your marital status changes after December 31 of the same tax year.
 - You filed married filing separately.
 - You filed an amended return. If selected for verification, the following 2 documents must be submitted: a. IRS Tax Return Transcript and a completed copy of the Amended Paper Tax Return (1040X). Incomplete forms will not be accepted.
 - You filed a foreign tax return.

INSTRUCTIONS

Step 1: Go to <https://studentaid.ed.gov>

Step 2: select login and click "Fill Out The FAFSA Form"

Step 3: Select "Returning User" and select "Log In"

Step 4: Select "I am the student"

Step 5: Provide FSA ID and Password and click "next"

Step 6: select "make FAFSA corrections" (blue link at bottom of page)

Step 7: create a "Save Key"

Step 8: Click on "Make corrections to a Processed FAFSA"

Step 9: select "Financial Information",

Step 10: enter response to "For 2020, have you (student) or your parents completed their IRS income tax return" - **must be already completed to complete IRS Data Retrieval**

Step 11: select the appropriate response for your filing status,

Step 12: enter FSA ID for student or parent as requested & select Link to IRS,

Step 13: enter address and submit - *Note: address must be a perfect match from paper tax return*

Step 15: once verified click on "Transfer data now"

Step 15: continue to follow the instructions to transmit the IRS Data to the FAFSA. Successfully transferred data will have the following comment—"transferred from the IRS."

Step 16: Please submit your FAFSA. It will not be processed without submission.

If you are unable to use this option, please follow the steps to obtain a tax transcript.

How to Obtain a Free Tax Return Transcript from the IRS

If your FAFSA is selected for verification, and you did not use the IRS Data Retrieval option or you changed the IRS data, you will be required to request a tax transcript from IRS and submit it to the Office of Scholarships and Student Aid. **Personal copies of tax returns can no longer be accepted.**

Three ways to request your Tax Transcript: by phone or by mail. Please make sure you request an **IRS Tax Return Transcript**. **DO NOT request a Tax Account Transcript or Record of Account** because they cannot be used for financial aid verification purposes.

To order by Mail: **OPTION 1**

- Go to <https://www.irs.gov/individuals/get-transcript> then select: "Request by Mail"
- Select "Return Transcript" & Select Tax Year "2020"
- Once received, upload the complete Return Transcript to your verification worksheet via NextGen.

Complete 4506-T Form: **OPTION 2**

- Form 4506-T is available online at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- On Line 5, please add student's NCCU Banner ID **ONLY**
- Request "Return Transcript for 2020" (Line 6 and 6a) or "Verification of Non-Filing" (Line 8).
- Complete Line 9, check the box before you sign and then sign
- Fax completed form to appropriate IRS on back page of 4506T.
- Once received, upload requested document to your verification worksheet via NextGen

Get Transcript Online Tool – OPTION 3

- Go to <https://www.irs.gov/individuals/get-transcript> and then "Request Online"
To register and use this service, you will need:
 - Your SSN, date of birth, filing status and mailing address from latest tax return,
 - Access to your email account,
 - Your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
 - A mobile phone with your name on the account.
- **Note: The IRS Get Transcript Online registration process will not result in any charges to the card or to the financial account.**
- The IRS will send the user a confirmation code via email and an authentication code via text. The IRS email and text will contain a one-time code that the user will use to finalize the Get Transcript Online registration.
Note: IRS will never request log-in information or personal data via email or text.
- If you are not able to successfully register the Get Transcript Online, you will be able to request a tax return transcript using one of the other options above.
- Once transcript or non-filing letter is received via mail; include student's name & BANNER ID on all pages and upload requested document to your verification worksheet via NextGen