

2019-2020 INSTRUCTIONS FOR USING THE IRS DATA RETRIEVAL TOOL IN FAFSA ON THE WEB AND THE IRS TAX RETURN TRANSCRIPT REQUEST PROCESS

The verification process requires a review of your 2019-2020 Free Application for Federal Student Aid (FAFSA). There are different methods you can utilize to obtain the 2017 required IRS Tax Return Transcript information. The best and recommended way to provide accurate 2017 IRS tax information is by utilizing the IRS Data Retrieval Tool (DRT) on FAFSA. Westminster College cannot accept a copy of your original 2017 IRS 1040, 1040A, or 1040EZ Tax Return(s). If you are unable or choose not to use the IRS Data Retrieval Tool on FAFSA, you must order a Tax Return Transcript from the IRS. Please write the student's name and school ID number on the Tax Return Transcript.

A. How to Transfer Your IRS Tax Information Directly into Your FAFSA

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. To use the Data Retrieval Tool (DRT), complete the following steps:

- Go to fafsa.ed.gov and click on the Login button under "Returning User"
- Log in using the student's FSA ID
- Select "Make FAFSA Corrections"
- Navigate to the Financial Information section of the FAFSA
- Answer the questions to see if the student and/or parent(s) is eligible to use the IRS Data Retrieval Tool
- Click "Link to IRS"
- For your protection, the tax information you transfer from the IRS into your FAFSA form will not be visible to you. Instead, you will see a message that you have successfully transferred your 2017 IRS tax information into the FAFSA.
- After successful transfer, go to Sign and Submit tab and agree to terms.
- Click on Submit My FAFSA.

B. How to order a Tax Return Transcript From the IRS

Tax filers can request from the Internal Revenue Service (IRS) an IRS Tax Return Transcript of their 2017 IRS tax return information, free of charge, in a number of ways shown below.

- Available on the IRS Web site at irs.gov
- Click "Get Your Tax Record"
- You can order a transcript online, by mail, or by calling the IRS at 1-800-908-9946
- You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this is the address used when the 2017 IRS tax return was filed). To register and use the "Get Transcript Online" service you will also need access to your email account, a mobile phone with your name on the account, and an account number of a credit account (credit card, mortgage, car loan)
- All transcript types are available online and you may view, print or download your transcript. Save your username and password to return later. For verification purposes, only the Tax Return Transcript is accepted.
- By mail or phone request, only the Tax Return Transcript is accepted. Please allow 5 to 10 calendar days for delivery.

C. How to Order a Verification of Non-filing Letter From the IRS

Parent(s) of Dependent students or Independent students and/or student's spouse who did not file a 2017 tax return are required to obtain a "Verification of Non-filing" letter from the IRS to verify a federal income tax return was not filed. This letter provides proof that the IRS has no record of a filed Form 1040, 1040A or 1040 EZ for tax year 2017 and may be obtained using "Get Transcript Online" or by completing and mailing to the IRS, Form 4506-T available to download at irs.gov/pub/irs-pdf/f4506t.pdf.