

How to Request a 2016 IRS Tax Return Transcript or Transfer Tax Info into Your FAFSA

Important Note: Federal regulations no longer allow students to provide a copy of their IRS 1040 forms if they are selected for verification. **(Remember: The 2018–19 FAFSA form requires your 2016 tax data.)**

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2016 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer. The IRS DRT can be used by both students and parents. Most students and parents are eligible to use the IRS Data Retrieval Tool; however, there are a few scenarios in which students and parents are ineligible to use the IRS Data Retrieval Tool. If you're unable to use the IRS DRT or choose not to use the IRS DRT in *FAFSA on the Web*, you can follow the instructions below for obtaining a 2016 IRS tax return transcript from the IRS.

Simple Steps to Transfer Tax Information into Your FAFSA®

The IRS Data Retrieval Tool (IRS DRT) Electronically Transfers Your Federal Tax Return Information Into Your FAFSA.

1. Log in to your FAFSA
2. In the finances section of the online form, you will see a "Link to IRS" button if you are eligible to use the IRS DRT.
3. Click the "Link to IRS" button and log in with your FSA ID to be transferred to the IRS to retrieve your info.
4. Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the "Submit" button.
5. Check the "Transfer My Tax Information into the FAFSA form" box, and click the "Transfer Now" button.
6. You will know that your federal tax return information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA form.

A **2016 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by MAIL – Go to www.irs.gov, 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.
- Get Transcript ONLINE – Go to www.irs.gov, 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.
- Automated Telephone 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 – 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.

After you receive the tax return transcript, write the student's name and ID number in the top right corner and submit it to the Financial Aid Office as soon as possible.

Document Submission Methods:

Fax: 641-683-5741

Email: OneStop@indianhills.edu

Mail: Indian Hills Community College

Attn: Financial Aid Office

525 Grandview Ave

Ottumwa, IA 52501

To check the status of your documents, go to WebAdvisor and click the Financial Checklist, under the Financial Aid heading.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2016 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2016, must provide:

- A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year 2016;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2016;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2017;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2016 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2016.