

Options to Obtain 2016 IRS Documents

It is very helpful to have your **2016 IRS Tax Return** document(s) in front of you when completing any of the four options below as you will have the Social Security Number (SSN) of the person who filed and the filer's address.

The Tax Return Transcript is a specifically titled document. There is no fee to request this document. Receiving an incorrect document may delay our ability to determine your financial aid eligibility.

OPTION 1: FAFSA's IRS Data Retrieval Tool (DRT)

1. Log-on to www.fafsa.ed.gov
2. Go to the "Financial Information" tab
3. For 2016, have you completed your IRS income tax return or another tax return? If so, select "Already Completed".
 - a. **If your answer to this question is "no" you will not be permitted to use IRS Data Retrieval process and will have to select one of the other Options listed her to obtain your tax transcript.**
4. For 2016, what is your tax filing status according to your tax return?
 - a. Select the option which applies to you.
 - b. The screen message response will be "To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question: "Did you file a Puerto Rican or foreign tax return for 2016?"
 - i. Your response must be "No" to proceed to IRS DRT. If you answer "yes" you cannot use IRS DRT.
5. Click the "LINK TO IRS" hyperlink button and follow the prompts.
6. On the IRS website, fill out the form—exactly the way in which you filled out your transmitted 1040 Tax Return and select "Transfer my tax information in the FAFSA."
7. Return to the FAFSA, and sign with your FSA ID, then click on "Submit My FAFSA" button.

IF YOU ARE UNABLE TO USE THE DATA RETRIEVAL TOOL, YOU MUST OBTAIN A TAX RETURN TRANSCRIPT USING EITHER Option 2, 3 or 4 below.

OPTION 2: Request an IRS Tax Return via mail.

1. Go to: <https://www.irs.gov/>
2. Select "Get Your Tax Record"
3. Click "Get Transcript by Mail" icon
4. Complete the following fields: Social Security Number, Date of Birth, Street Address, ZIP or Postal Code as it was when you filed your 2016 tax return.
5. Press "Continue" icon.
6. Under Type of Transcript, select "Return Transcript."
7. Under Tax Year, select "2016."
8. Continue to follow pop-up prompts accordingly.

OPTION 3: Request an IRS Tax Return Transcript over a touchtone phone **Call 1-800-829-1040.**

1. Press 1 for English or 2 for Spanish.
2. Press 2 for answers about your personal income taxes.
3. Press 1 for information about your income tax history.
4. Press 4 for all other questions about your tax history.
5. Press 2 for all other questions about your tax history.
6. From a touch-tone phone, enter the SSN of the person who filed as head of household.
7. Press 1 to indicate you entered your SSN.
8. Press 1 if you entered your SSN correctly. (Press 2 if you entered your SSN incorrectly and re-enter.)

9. Press 3 to request a transcript of your tax return.
10. Verify your address by using touch tone phone.
11. Press 2 to receive a transcript of your tax return.
12. Enter 2016
13. Continue to follow voicemail system prompts and answer questions accordingly.

OPTION 4: Request an IRS Tax Return Transcript using IRS Form 4506T <https://www.irs.gov/pub/irs-pdf/f4506.pdf>.

Applicants who did not file a 2016 Federal Income Tax Return

In order for our office to verify that a 2016 tax return was not filed, you are required to provide us with documentation from the IRS that confirms a tax return was not filed. This document is the 2016 Verification of Non-Filing Letter and can be obtained free of charge directly from the IRS.

To obtain that letter, complete the attached IRS Form 45065-T and mail or fax it to the IRS

- Complete items 1a-4 on the form.
- Check box 7 “verification of non filing”.
- If you worked in 2016, also check box 8.
- Enter 12/31/2016 for box 9
- Sign and date the form.

To fax IRS Form 4506-T send to 855-821-0094, if your address was in any of the following states: **MAINE**, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, District of Columbia, Delaware, Florida, Georgia, Maryland, Missouri, New Jersey, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Virginia, West Virginia.

If you prefer to mail the form and you lived in one of the states listed above, mail the form to the following address:

Internal Revenue Service
RAIVS Team
Stop 6705 P-6
Kansas City, MO 64999

If your address was in a different state from those listed above, please contact our office for assistance.