

Instructions for Using the IRS Data Retrieval Tool or Obtaining an IRS Return Transcript

If you were selected for verification and are required to provide income tax information, you must provide this information directly from the IRS. The two methods for doing this are detailed below. The first method is preferable (if you are able to use it), due to speed and ease of making the request. To use this method you must allow for processing periods, depending on how you submitted your information to the IRS.

- For electronically filed tax returns you must wait 1-2 weeks after filing before your data will be available using the IRS Data Retrieval Tool.
- For tax returns filed by paper you must wait 6-8 weeks after filing before your data will be available using the IRS Data Retrieval Tool.

IRS Data Retrieval Tool- Submitting your FAFSA using the IRS Data Retrieval Tool allows you to transfer information directly from the IRS to your FAFSA. An instructional video is available on [UM's Financial Aid Office's Verification page](http://www.umt.edu/finaid/apply-for-aid/additional-requirements/verification) (www.umt.edu/finaid/apply-for-aid/additional-requirements/verification).

If you did not use the data retrieval on your original FAFSA, you can make a correction to your [FAFSA](http://fafsa.ed.gov) (fafsa.ed.gov): log into student's FAFSA record, select "Make FAFSA Corrections," and go to the Financial Information section of the form. Follow instructions to determine if you are eligible to use this tool.

Note:

The IRS updates all mailing address to match their format. When providing your address you must abbreviate anything that can be and do not include any punctuation. (ex: Street to St)

You may **not** be able to use the IRS Data Retrieval Tool due to one of the following reasons:

- Tax return filing status is 'Married Filing Separately'
- Marital status has changed since January 1, 2016
- Changes were made to tax questions on the FAFSA **after** the IRS Data Retrieval has taken place
- Filed an amended tax return
 - A copy of IRS tax return transcript and the amended tax return (1040X) must be submitted to our office.
- Are required to file, but have been granted an extension by the IRS. Submit the following:
 - A copy of the 2015 IRS Form 4868
 - A **signed and dated** written income statement that indicates the estimated Adjusted Gross Income and Taxes Paid for 2015. These do not need to be from an accountant or IRS Office.
 - All 2015 W2(s). If self-employed include that information in the income statement.
- Filed a Puerto Rican or foreign tax return – you will need to submit a signed copy of your tax return

Return Transcript- If you are unable to use the IRS Data Retrieval Tool you **must** submit a Return Transcript from the IRS to our office. Most requests are processed within 10 days. To request:

- You may request a Return Transcript online through the [IRS website](http://www.irs.gov/Individuals/Get-Transcript) (www.irs.gov/Individuals/Get-Transcript). Transcripts can be ordered using the Get Transcript by Mail service.
 1. Call the IRS at 1-800-908-9946 (on the automated menu):
 2. Enter and verify your Social Security Number
 3. Enter in your street address number
 4. Select Option #2 to request a Return Transcript
 5. Enter and verify the year of your needed Return Transcript (for a 2016-17 verification, request the 2015 tax year)
- You may complete Form 4506T: *Request for Transcript of Tax Return*, and mail it or fax it to the address/phone number indicated on the form. To request a Return Transcript check **box 6a**. Requesting a Return Transcript is free of charge. You can print this form from the [IRS forms page](http://www.irs.gov/pub/irs-pdf/f4506.pdf) (www.irs.gov/pub/irs-pdf/f4506.pdf).

To contact the IRS for general questions call 1-800-829-1040 or visit the [IRS website](http://www.irs.gov) (www.irs.gov).