

# Please keep for your records.

## Directions for using the IRS Data Retrieval Tool or requesting a Tax Return Transcript

### 1. The IRS DRT is available in the “Financial Information” section of the student’s FAFSA.

1. Go to <https://fafsa.ed.gov/> and select “Login.”
2. Enter the student’s FSA ID and password and select “Next.” Then select “Make FAFSA Corrections.”
3. Once you are logged in, go to the “Financial Information” section; the fifth tab on the top.
4. If you filed taxes, confirm the tax filing status is “Already Completed.”
5. Answer a set of questions to determine your eligibility for using the tool. (If you are eligible, a “Link To IRS” option will appear.)
6. On the IRS website, after you enter and verify your information, you will need to select “Transfer Now.”

Once the IRS data for the student and/or parent is transferred to the FAFSA, select the “Sign & Submit” tab. The FAFSA must be signed electronically with the student’s and parent’s FSA IDs and re-submitted for processing.

### 2. To obtain a 2017 IRS Tax Return Transcript online by download:

1. Go to [www.irs.gov](http://www.irs.gov) and under the Tools heading on the IRS homepage, click on the “Get Tax Transcript” link.
2. Click on the “Get Transcript ONLINE” link, create an account, and follow the prompts.
3. You will be asked your reasoning for requesting a transcript. You can indicate “Higher Education/Student Aid.”
4. Please select “2017” under the *Return Transcript* section.

### 3. To obtain a 2017 IRS Tax Return Transcript online via mail:

1. Go to [www.irs.gov](http://www.irs.gov) and under the Tools heading on the IRS homepage, click on the “Get Tax Transcript” link.
2. Click the “Get Transcript by MAIL” link and enter in your information (filer’s SSN, DOB, Address, and Zip).
3. Select “Return Transcript” under “type” and “2017” under “year.”
4. Once submitted, you can expect your transcript in 5-10 business days.

### 4. To obtain a 2017 IRS Tax Return Transcript by phone:

1. Call the IRS at 1-800-908-9946.
2. Follow the prompts and enter the required information (filer’s SSN and address).
3. You will be asked what type of transcript you wish to receive. Choose #2- a transcript of your tax return.
4. You will be asked which tax year you would like a transcript for. Choose “2017.”

### 5. To obtain a 2017 IRS Tax Return Transcript by mail:

1. Go to <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>. Print form and complete in its entirety.
2. You will be asked in Question 5 to provide a customer file number. Please use “0000+MSOE Student ID Number.”
3. You will be asked in Question 6 which type of transcript you need. Write “1040” and check “Return Transcript” in part 6a.
4. You will be asked in Question 9 which tax year you would like a transcript for. Indicate “12/31/2017.”

Please submit the transcript(s) to our office. It can be faxed to 414-277-6952 or dropped off.

If you have any trouble with this process, feel free to call MSOE’s Financial Aid Office for help at 414-277-7223.

### Exceptions:

- *Do you owe the IRS for your taxes? If so, a transcript or the IRS DRT may not be available until 2-3 weeks (minimum) after full payment for debts have been received by the IRS.*
- *Are you a victim of identity theft? If so, MSOE will need a copy of the IRS Database View Transcript along with a signed statement about your identity theft with the IRS. A transcript can be requested from the IRS Identity Protection Specialized Unit at 1-800-908-4490.*
- *If you did not file taxes, and are an independent student or parent of dependent student, you will need to request a Verification of Non-Filing Letter using Step #2, #3, or #5. NOTE: If you do not have credit history, you will only be able to request the letter by method #5.*