



Instructions for TAX RETURN TRANSCRIPTS Requirement

Or

IRS WAGE AND INCOME TRANSCRIPTS (W2'S-1099'S)

There is no fee for a TAX RETURN or WAGE AND INCOME TRANSCRIPT.

If you are ordering online and it is asking for payment, exit the site immediately. Make sure you are on the www.irs.gov site only.

TAX RETURN TRANSCRIPT:

Make sure to order the Tax RETURN Transcript.

We cannot accept a "tax account transcript" in place of the tax RETURN transcript.

1. **FAFSA - IRS DATA RETRIEVAL* is the easiest way to go.** Please see reverse side for instructions.

Log onto the FAFSA site, www.fafsa.ed.gov using your PIN and select the FAFSA-IRS DATA RETRIEVAL process from the income tab of your FAFSA. This will allow the IRS to automatically download your Tax Return Transcript data to the FAFSA, which means RRCC will not need a paper copy of it.

2. **ONLINE at www.irs.gov :**

- Under Tools, click on "[Get Transcript of Your Tax Records](#)".
- While on the "Get Transcript" screen, select to "[Get Transcript ONLINE](#)" for immediate printing Or "[Get Transcript by MAIL](#)".
- "Sign In" using your User ID or "Sign Up" if you have not yet created one.
- Once you are Signed in: (Selecting various buttons will offer various suggestions for types of documents to download) Select the "Higher Education/Student Aid" reason option from the drop down arrow and click "GO". The page will now suggest "**Return Transcript**" (Type of requested document is now inside of selection frame)
- Select the year of the requested document, ie: 2014.
- You should now be viewing your "Tax Return Transcript" on screen.
- Print the .pdf file

2. **By PHONE**

- Dial 1-800-908-9946.
- Follow the prompts, and have your tax return in order to answer the prompts.
(Select option 2 or 4 for transcripts)

4. **By MAIL**

- Download and print the 4506-T form found at www.irs.gov.
- Fill it out with the correct Aid Year.
- Mail the form to the IRS. (The address you'll need is on the 4506-T form.)

IRS WAGE AND INCOME TRANSCRIPTS (W2'S-1099'S):

ONLINE at www.irs.gov :

- Under Tools, click on "[Get Transcript of Your Tax Records](#)".
- While on the "Get Transcript" screen, select to "[Get Transcript ONLINE](#)" for immediate printing Or "[Get Transcript by MAIL](#)".
- "Sign In" using your User ID or "Sign Up" if you have not yet created one.
- Once you are Signed in: (Selecting various buttons will offer various suggestions for types of documents to download) Select the "Higher Education/Student Aid" reason option from the drop down arrow and click "GO".
- Select the year of the requested document, ie: 2014, under the "**Wage & Income Transcripts**" heading.
- You should now be viewing your "Wage & Income Transcripts" on screen.
- Print the .pdf file

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.

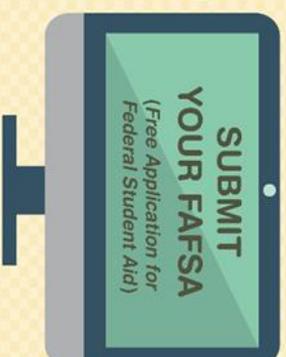
EASY Transfer info with the click of a button.

FAST Instantly retrieve your information.

ACCURATE Correctly fill in data fields.

WHY

HOW



1 Log in to your current FAFSA, or start a new FAFSA at www.fafsa.gov

3 Click the "Link to IRS" button and log in with the IRS to retrieve your tax return information.

5 Check the "Transfer My Tax Information into the FAFSA" box, and click the "Transfer Now" button.

2 In the finances section of the FAFSA, you will see a "Link to IRS" button if you are eligible to use the IRS DRT.

4 Review your tax return information, and see the tax data that will be transferred into your FAFSA.

6 Review your federal tax return information that has been transferred into the data fields on your FAFSA.

WHEN

AVAILABLE

The IRS DRT is available the first Sunday in February.

TRANSFER

Depending on whether you filed your taxes electronically or by mail, you may be able to use the IRS DRT in as little as two weeks from when you filed your tax return.

REMEMBER

If you submitted your FAFSA before you filed your taxes, you can still transfer your tax return information. Log in to your FAFSA and update your tax return status to "Already Completed." You will see the link to the IRS DRT. Follow steps three through six above and resubmit your FAFSA.

The IRS DRT can be used by both students and parents.

Federal Student Aid
An Office of the U.S. Department of Education

Proud Sponsor of
The American Mind®

To learn more about the IRS DRT, visit StudentAid.gov/irs-drt