

## You have 2 options for submitting your 2016 tax information to us:

All 2018-2019 FAFSA On The Web applicants, and the parents of dependent applicants, who indicate that they have filed their federal tax returns prior to completing their FAFSA may use the FAFSA-IRS Data Retrieval process to complete their FAFSA.

### How the IRS Data Retrieval works:

If you and your parents have filed federal tax returns before starting the FAFSA, you will be able to transfer your tax and income information while completing the FAFSA. If you have not filed federal tax returns before starting the FAFSA, you may input the IRS Data Retrieval information after filing federal tax returns by using the FAFSA corrections process.

Families must actively choose to utilize the IRS Data Retrieval. When you choose to do so, you will be transferred to the Internal Revenue Service web site. You will need to authenticate your identity before any personal information is displayed.

During the completion of the FAFSA, you will have the option to “Transfer” tax information to the FAFSA. Applicants can also choose NOT to transfer the data to the FAFSA. Transferred data will have a notation - “Transferred from the IRS.” ***\*\*NEW this year: You will not be able to see any tax data once you have authenticated your identity, and no tax or income data will be visible once you have transferred it to the FAFSA. A field marked “Transferred from the IRS” indicates that the data has been successfully transferred.***

### Some Families Will Not Be Able to Use the IRS Data Retrieval Tool:

(There are some exceptions with these situations listed below. If you’re having concerns or questions contact your local IRS Office for clarification.)

- If the parents of a dependent student file separate tax returns;
- If an applicant’s parent has a change in marital status after the end of the tax year on December 31, 2016;
- If the applicant or applicant’s parents have filed a foreign tax return.

### Families Unable to Use the IRS Data Retrieval Tool:

If you are unable to use the IRS Data Retrieval Tool you must request an IRS Tax Return Transcript to verify your income.

#### OFFICE OF STUDENT FINANCIAL ASSISTANCE

103 Horace Mann  
1701 South Broadway Street  
Pittsburg, KS 66762-7534

PHONE: (620) 235-4240 or (800) 854-7488

FAX: (620) 235-4078

WEBSITE: [http://www.pittstate.edu/office/financial\\_aid/](http://www.pittstate.edu/office/financial_aid/)

## **Option 1:**

### **IRS Data Retrieval Tool**

- Go to [fafsa.ed.gov](https://fafsa.ed.gov). Once you are at the home page you can then either login or start a new FAFSA if you have not already completed one.
- Enter your **FSA ID** and **password** or enter your first & last name, Social Security Number & date of birth then click **Next**.
- Click **next** on the instruction page.
- You will then either need to **Start a New FAFSA** if you have not already filed the 2018-2019 FAFSA or **Make FAFSA Corrections** if you have already filed a FAFSA for 2018-2019.
- Across the top of the next page you will see different tabs to click on and you should proceed to the **Financial Information Tab**. (Note: If you are not making corrections and are filing for the first time, fill in all of the information in the previous tabs for Student Demographics, etc. first then when you get to the Financial Information Tab go to the next step)
- Must select “Already Completed” from the drop down menu to use DRT.
- Select which parent you will be transferring tax information for from the drop down menu.
- Enter the person’s FSA ID for which you will be transferring tax information. (Note: if you are a dependent student you will need to do this for both you and your parents)
- Click **LINK TO IRS**.
- A page will then pop up that you are leaving FAFSA and going to the IRS website, click **OK**.
- Once you are on the IRS website you will have to finish filling in the information asked for *exactly the way it is shown on your taxes* then click **SUBMIT**. If you are having issues with the address not being identical as on your tax return you may visit USPS.COM to verify that you have the correct address information.
- If your information has been authenticated, then at the bottom you will be asked whether you would like to transfer your information to FAFSA or not, check mark the box that says “Transfer my Tax Information into the FAFSA”, then click **Transfer Now**. (**NOTE: You will not be able to view your income or tax data, either on the IRS website or once you have transferred it**)
- You will then be taken back to FAFSA where it will indicate “**Transferred from the IRS**” for the fields that have been transferred from the IRS website.
  - **Rollovers**: If an amount greater than \$0 is transferred from the IRS into the Untaxed Portions of IRA Distributions field or the Untaxed Portions of Pensions field in the FAFSA form, the applicant or parent will be required to answer a new question about whether or not that amount includes a rollover. If the applicant or parent answers “yes,” he/she will be required to provide the amount of the rollover in a new entry field.
  - **Income Earned From Work**: Because IRS-transferred information will not be displayed, applicants and parents who filed a joint tax return will no longer be able to transfer their combined income earned from work into the FAFSA form from the IRS DRT website. These joint filers will now be required to enter their income earned from work manually. Single applicants and single parents will continue to have their income earned from work transferred from the IRS into their FAFSA form.
- Sign and submit your FAFSA using both the student’s and parent’s FSA ID (note: if you are making corrections and have previously signed and submitted you must do so again.)
- Once you have signed and submitted, corrections will be sent to our office with your tax information from FAFSA in about a week.

If you are having trouble with this process or cannot get your information transferred, then you must order a Tax Return Transcript. (See Below for further steps)

## **Option 2:**

### **Obtaining a Tax Return Transcript**

Tax filers can request a return transcript, **free of charge**, of their 2016 tax return from the IRS in one of five other ways.

#### **Online Request**

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov).
- On the homepage, click “Get My Tax Record”.
- Click “Get Transcript Online” or “Get Transcript By Mail”.
- Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. If you are having trouble matching your address, go to [www.usps.gov](http://www.usps.gov), use the Zip Code option and use the “standard” address that the USPS has on file. IRS uses the same address as USPS.
  - Married Filing Jointly-If you filed jointly with your spouse, tax data is listed under the social security number of the primary taxpayer shown on your tax return.
- Click “Continue”
- In the Type of Transcript field, select “Return Transcript” and in the Tax Year field select “2016”.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request within 5 to 10 days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

#### **Telephone Request**

- Available from the IRS by calling 1-800-908-9946
- Follow prompts to enter Social Security Number and the numbers in the street address. Usually, these will be the numbers of the street address that was listed on the latest tax return filed, but if IRS doesn’t find a match, use the address listed on the USPS website listed above.
- Select Option 2 to request an IRS “Tax Return Transcript”, and then enter “2016”.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts by telephone cannot be sent directly to a third party by the IRS.

#### **Telephone Request (representative for faxed tax transcript)**

- Call the IRS at customer service number 1-800-829-1040. Assistance is available between the hours of 7:00 am and 7:00 pm (local time).
- Follow the prompts as listed above for Tax Return Transcript for the year “2016”. Stay on the line to talk to an IRS Representative. Ask the customer service representative to fax you a copy of your tax return transcript.
  - In most cases, you will need to be at the fax machine to assure that your sensitive information is kept private and secure. You may need to stay on the line to confirm receipt of the faxed tax transcript and the number of pages received.

## Paper Request Form - IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript
- Download the IRS Form 4506T-EZ at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1-4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS
  - Transcripts should only be sent directly to the PSU Office of Student Financial Assistance (OSFA) if the transcript is for the student or if the student is claimed as a dependent on the tax return. The OSFA cannot identify transcripts if the student is not listed.
- On line 6, enter “2016” to receive IRS tax information for the 2016 tax year that is required for the 2018-2019 FAFSA.
- Sign and date the form and enter a telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or fax number) provided on page 2 of the form.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing Form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

## Local IRS Offices

- You may be able to obtain a **Tax Return Transcript**
- Services are available **BY APPOINTMENT ONLY** at local IRS Offices. Please call **1-844-545-5640** to schedule an appointment.
- For Additional Information about local IRS Offices not listed below go to <https://www.irs.gov/help/tac-locations-where-in-person-document-verification-is-provided>
- Photo ID is required

Local IRS Offices closest to PSU:

City	Street Address	Days/Hours of Service
Joplin	402 S. Main St., Ste. 501 (US Bank Building) Joplin, MO 64801	Monday-Friday 8:30 a.m. - 4:30p.m. (Closed for lunch 12:00 - 1:00 p.m.)
Overland Park	6717 Shawnee Mission Parkway Overland Park, KS 66202	Monday-Friday 8:30 a.m. - 4:30 p.m.
Topeka	120 S.E. Sixth Ave Topeka, KS 66603	Monday-Friday 9:00 a.m. - 4:30 p.m. (Closed for lunch 12:30 – 1:30 p.m.)
Wichita	555 N. Woodlawn Building 4 Wichita, KS 67208	Monday-Friday 8:30 a.m. - 4:30 p.m. (Closed for lunch 12:30 -1:30 p.m.)
Fayetteville	655 E. Millsap Road Fayetteville, AR 72703	Monday-Friday 8:30 a.m. - 4:30 p.m. (Closed for lunch 11:30 a.m.-12:30 p.m.)
Tulsa	224 S. Boulder Tulsa, OK 74103	Monday-Friday 8:30 a.m. - 4:30 p.m.