



Financial Aid Office  
2715 Dickinson St  
Miles City, MT 59301  
Phone: (406) 874-6208  
Fax: (406) 874-6283

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

You have been selected for verification and are required to provide income tax information before further processing of your financial aid can take place. You must provide this information directly from the IRS, via one of the two methods detailed below.

**Method 1 – IRS Data Retrieval Tool: Preferred, due to speed and ease of making the request. To use this method, you must allow for processing periods, depending on how you filed your 1040, 1040A, or 104EZ with the IRS.**

- For electronically filed tax returns, you must wait two weeks after filing before your data will be available from the IRS.
- For tax returns filed by paper, you must wait eight weeks after filing before your data will be available from the IRS.

1. Visit [fafsa.ed.gov](http://fafsa.ed.gov).
2. Log into student's FAFSA record using student's Federal Student Aid (FSA) ID and password.
3. Select "Make FAFSA Corrections."
4. Go to the "Financial Information" section of the form.
5. Follow instructions to determine if you are eligible to use this tool.
6. Enter the requested information on the IRS website **EXACTLY** as it appears on your tax return (**this is case sensitive**).
7. Once the IRS has validated your identification, your IRS tax information will be displayed.
8. Transfer data (make no changes to the data transferred).
9. Save.
10. Sign with FSA ID and password.
11. Submit.

**Method 2 – Tax Return Transcript from the IRS; most requests are processed within 10 days and is free of charge. To request, use one of the following options:**

- A. IRS Tax Return Transcripts can be ordered online through the IRS website by going to <http://www.irs.gov/Individuals/Get-Transcript>. There is an option available to download a PDF file of the transcript online, instead of waiting to receive the transcript in the mail. Please see the following of what the website looks like.

## Get Transcript

Get a record of your past tax returns, also referred to as transcripts. IRS transcripts are often used to validate income and tax filing status for mortgage applications, student and small business loan applications, and during tax preparation.

You can download and print your transcript immediately, or request the transcript be mailed to your address on record.

Get Transcript  
ONLINE



- View and print your transcript immediately.
- Choose among [Tax Return](#), [Tax Account](#), [Record of Account](#), or [Wage and Income](#) transcripts or a [Verification of Nonfiling Letter](#).
- Need help? [More information about Get Transcript Online](#).

Get Transcript by  
MAIL



- Transcripts arrive in 5 to 10 calendar days.
- Choose from either a [Tax Return](#) or [Tax Account](#).
- Transcript by Mail is available [en Español](#).

**B. Call the IRS at 1-800-908-9946 (on the automated menu):**

1. Enter and verify your Social Security Number
  2. Enter in your street address number
  3. Select Option #2 to request a “return transcript”
  4. Enter and verify the year of your needed return transcript (2014 tax year)
- C. **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. You can print this form off at: <http://www.irs.gov/pub/irs-pdf/f4506t.pdf?portlet=103>.
- D. Photocopy the transcript prior to submitting to our office.

**Those not eligible to utilize the IRS Data Retrieval Tool:**

- If you or your parents’ tax return filing status is ‘*Married Filing Separately*’; provide a transcript for each person.
- If an *amended* tax return was filed, provide a signed copy of the original 1040, along with a signed copy of the 1040X.
- Are required to file, but have been granted a filing extension by the IRS, submit a signed copy of Form 4868.
- Filed a Puerto Rican or foreign tax return, submit a signed copy of that tax return.