

Instructions for Using the IRS Data Retrieval Tool, obtaining an IRS Return Transcript, Or IRS Verification of Non-Filing Letter for the 2017-2018 Academic Year

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.

- A. If you did not use the data retrieval on your original FAFSA, you can make a correction by visiting: FAFSA.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.
- B. You may not be able to use the IRS Data Retrieval Tool due to one of the following reasons:
 - a. Tax return filing status is 'Married Filing Separately'
 - b. Marital status has changed since December 31, 2015
 - c. Changes were made to tax questions on the FAFSA **after** the IRS Data Retrieval has taken place
 - d. Filed an amended tax return
 - i. Signed copies of both the originally filed tax return (1040, 1040A, or 1040EZ) and the amended tax return (1040X) must be submitted to the Financial Aid Office.
 - e. Are required to file, but have been granted an extension by the IRS. Submit the following:
 - i. A copy of the 2014 IRS Form 4868
 - ii. 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.
 - iii. All 2015 W2(s). If self-employed include that information in the income statement.
 - f. Filed a Puerto Rican or foreign tax return – you will need to submit a signed copy of your tax return.

Return Transcript (or) Verification of Non-Filing Letter– If you are unable to use the IRS Data Retrieval Tool you **must** submit a IRS Tax Return Transcript from the IRS to our office. Most requests are processed within 10 days. To request:

- A. To provide the best possible service, starting January 25, 2016, you will have to schedule an appointment to pick up a hard copy from the office directly.
 - a. The Helena IRS office phone number is:
(844) 545-5640
 - b. And the Helena IRS office is located at:
10 W. 15th St. Suite 2300
Helena, MT 59626
- B. You may request a Return Transcript online through the IRS website by going to <http://www.irs.gov>. Under 'Get Your Tax Record'. You must have access to a valid email address, a text-enabled phone (no pay-as-you-go), and specific financial account numbers. Complete the required information and a Tax Transcript will be ordered.
- C. Call the IRS at 1-800-908-9946 (on the automated menu):
 - a. Enter and verify your Social Security Number
 - b. Enter in your street address number
 - c. Select Option #2 to request a Return Transcript
 - d. Enter and verify the year of your needed Return Transcript (for a 2017-2018 verification, request the 2015 tax year)
- D. You may complete Form 4506T: *Request for Transcript of Tax Return (or) Verification of Nonfiling Letter*, 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 at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf?portlet=103>

To contact the IRS for general questions call 1-800-829-1040 or visit their website: www.irs.gov.