2015-2016 IRS Data Retrieval Tool

Data is available within 1-2 weeks of electronically filing your taxes or 6-8 weeks of filing a paper tax return. These instructions assume you have already filed your 2015-2016 FAFSA.

Skip ahead to Section 2 if: (you cannot use the Data Retrieval Tool)
- If you have filed an Amended Return, you are required to submit your signed 1040X form & a signed copy of your 2014 Tax Return OR your Tax Return Transcript to the Financial Aid Office.
- If you are the victim of identity theft, you must provide an alternate tax return transcript known as the TRDBV (Transcript DataBase View). Please contact the Identity Protection Specialized Unit (IPSU) at 1-800-908-4490 to request that transcript.
- You have filed an extension
- You are married filing separately
- You (or your parents if Dependent) have had a marital status change since January 1, 2015

Section 1: How to Use the IRS Data Retrieval Tool (Linking your FAFSA with the IRS)

1. Go to www.fafsa.ed.gov and click Login
   Enter requested information (Name, SSN, & Date of Birth) and click Next

2. Make sure the correct year’s FAFSA is selected on the tab at the top of the screen. Click on Make FAFSA Corrections

3. Enter the requested Student PIN and the password created when the FAFSA was originally filed.

4. Click on Financial Information tab.
   If you want to use the Data Retrieval tool for the STUDENT ONLY, press NEXT at the bottom of the page before continuing.
   To use it for the PARENT or BOTH STUDENT AND PARENT, continue to step 5.
5. Change “Blank” to “Already Completed” from dropdown if it hasn’t already been changed.

6. Select the tax filing status according to tax return.

7. Answer the 3 questions listed. As long as you can select No to each question, you should be eligible to use the Data Retrieval Tool. If any of the provided situations apply, you are not eligible to use the Data Retrieval Tool. If you are ineligible to use the data retrieval tool, please proceed to Section 2 of these instructions: “I Am Not Eligible to Use the Data Retrieval Tool”

8. Once all No boxes are checked, a box will appear beneath the questions. Enter the requested PIN and click LINK TO IRS.

9. Click OK

10. Now on the IRS website, enter requested information exactly as it appears on your tax return:
    
    - Name
    - DOB
    - Filing Status
    - Address

11. Click Submit
    
    If the IRS is able to validate your identification, your IRS tax information will display.

12. Check the Transfer My Tax Information & Click Transfer Now

13. Click OK
    
    *You may now repeat Steps 5-12 to use the Data Retrieval tool for the Student.

14. Click Sign & Submit tab, Enter PIN [SIGN]. Agree to Terms

15. Click Submit My FAFSA Now You’re done! It takes about 24 hours for the Data Retrieval information to be made available to UND. To expedite the process, please contact the UND Financial Aid Office 24 hours after you submit it.

If you do not Sign & Submit, your changes will not be saved and UND will not receive your Data Retrieval!
Section 2: I Am Not Eligible to Use the Data Retrieval Tool – How to Obtain a Transcript from the IRS.

Due to changes made in 2012 by the Department of Education, the UND Financial Aid Office is unable to use copies of your Tax Return for Verification.

The fastest way to obtain your Official IRS Tax Return Transcript is to print it off of the IRS website. Go to [www.IRS.gov](http://www.irs.gov), click on “Get Transcript of Your Tax Records,” under Tools and follow the on screen instructions. Detailed instructions on how to access/print your IRS tax records can be found on the UND Financial Aid Website.

Other methods of obtaining your Tax Transcript:

**Online**: Takes 5-10 business days

1. Go to [www.IRS.gov](http://www.irs.gov)
3. Click “Get Transcript by Mail.”
4. Click Ok
   Enter requested information exactly as it appears on your tax return and click Continue.
5. Select type of transcript. You will need to order the Return Transcript & Tax Year Requested. We are unable to use an Account Transcript for verification purposes.
6. Click Continue. You’re done! Your transcript will be mailed within 5 to 10 business days.

**IRS2GO Mobile App**: Request a return transcript using your smartphone. IRS.gov/irs2go

**Phone**: Call the IRS at 1-800-829-1040 or 1-800-908-9946 and request the Tax Return Transcript for requested year

**Mail**: Submit a 4506-T or 4506T-EZ to the IRS to request the IRS send your Tax Return Transcript to you.

**If you have filed an extension** and have not yet filed taxes, we need your Form 4868 Application for Automatic Extension of Time to File U.S. Individual Income Tax Return and your 2014 W2s (if self-employed, you must provide a signed statement estimating Adjusted Gross Income (AGI) and income taxes paid for 2014). We will process the Verification using the estimated numbers BUT once your taxes have been filed, we will need a copy of your Tax Return Transcript(s). Your awards may change to reflect the actual numbers on the transcript. If your Tax Transcript is not submitted by January 2016, your Spring 2016 disbursement will be put on hold!