

MOORPARK • OXNARD • VENTURA FINANCIAL AID OFFICE

IRS DATA RETRIEVAL TOOL INSTRUCTIONS

- ✓ Log into www.fafsa.gov
- ✓ Click on “Make FAFSA Corrections”
- ✓ Click on “Financial Information” tab (Fig. 1):
- ✓ Click **Link to IRS** (Fig. 1) and **OK**
- ✓ On the IRS Web site enter the requested information exactly as it appears on your 2014 taxes (Fig. 2) and click **Submit**
- ✓ Click on the box under the “Transfer My Tax Information into the FAFSA” and then click **Transfer Now**
- ✓ You should receive the message “You have successfully transferred your 2014 tax information”
- ✓ Complete all steps and electronically sign and **Submit** your FAFSA
- ✓ Your FAFSA is successfully submitted once you have received a *confirmation number*

The screenshot shows the FAFSA website interface. The 'Financial Information' tab is selected. A message states: 'Application was successfully saved.' Below this, there are dropdown menus for 'For 2014, have you completed your IRS income tax return or another tax return?' (set to 'Already completed') and 'For 2014, what is your tax filing status according to your tax return?' (set to 'Single'). A prominent blue arrow points to a 'LINK TO IRS' button. A red circle with the number '1' is located in the bottom right corner of the screenshot.

2

The screenshot shows the IRS website's 'Get My Federal Income Tax Information' form. The form is titled 'Enter the following information from your 2014 Federal Income Tax Return.' and includes fields for: First Name, Last Name, Social Security Number (with a partial number '*** - ** - 325'), Date of Birth, Filing Status (set to 'Single'), and Address (Street Address, P.O. Box, Apt. Number, Country (set to 'United States'), City, Town or Post Office, State/U.S. Territory (set to 'Select One'), and ZIP Code). A blue arrow points to the 'Submit' button at the bottom right. The form also includes a 'Return to FAFSA' button and a 'Return to FAFSA | Log Out | Help' link at the top right.

TAX RETURN TRANSCRIPT ONLINE REQUEST

PLEASE NOTE: The IRS no longer offers Tax Return Transcript downloads (PDF files) for viewing or printing on their website. If you are unable to successfully use the IRS Data Retrieval Tool by following the steps provided, please follow the steps below to request a Tax Return Transcript via US Mail.

- ✓ Visit the IRS Web site at www.irs.gov
- ✓ In the **TOOLS** section of the homepage click **“Get a Tax Transcript by Mail”**



- ✓ Click **“Get Transcript by MAIL”**
- ✓ Enter the information requested as prompted
- ✓ On the next page, *Type of Transcript* should be **“Return Transcript”** for Tax Year **“2014”**. Click Continue

- ✓ If you are successful in requesting the Tax Return Transcript by mail, you will receive the following message:
“We have accepted your request for a 2014 Return Transcript. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you.”

IRS OFFICE INFORMATION

***Please attempt to request the transcript online before visiting the IRS Office.
Assistance is available in the Financial Aid Office.***

- ✓ Visit 751 Daily Drive Suite #101, Camarillo, CA
 - ✓ Request a **Tax Return Transcript** for the appropriate aid year.
- Phone: (800) 829-1040