

MOORPARK • OXNARD • VENTURA FINANCIAL AID OFFICE

IRS DATA RETRIEVAL TOOL INSTRUCTIONS

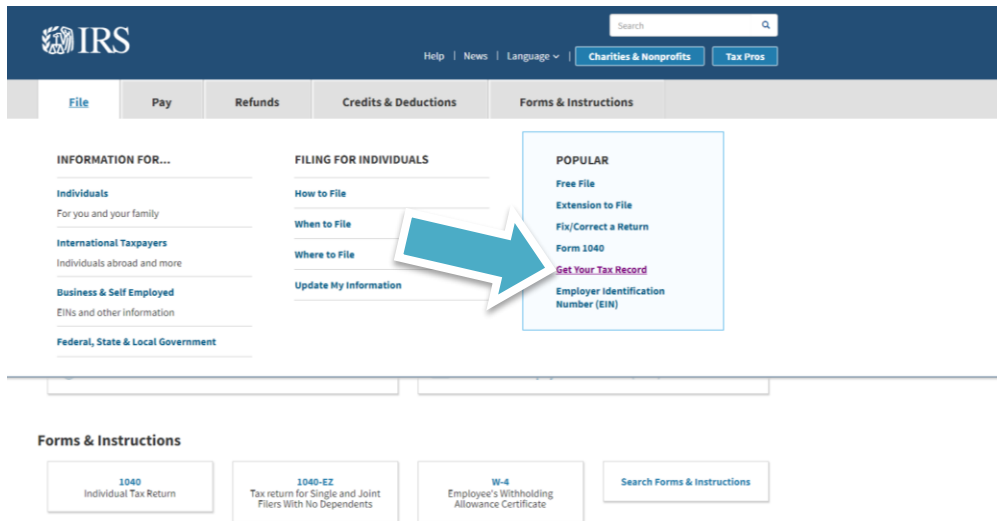
- ✓ Log into www.fafsa.gov
- ✓ Click on “Make FAFSA Corrections”
- ✓ Click on “Financial Information” tab (Fig. 1)
- ✓ Click **Link to IRS** (Fig. 1) and **OK**
- ✓ On the IRS Web site enter the requested information exactly as it appears on your 2016 taxes (Fig. 2) and click **Submit**
- ✓ Click on 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 2016 tax information”
- ✓ Complete all steps and electronically sign and **Submit** your FAFSA
- ✓ Your FAFSA is successfully submitted once you have received a *confirmation number*

2

TAX RETURN TRANSCRIPT ONLINE REQUEST

PLEASE NOTE: We strongly recommend all students/parents try to use the IRS Data Retrieval Tool. 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 **FILE** section of the homepage click “**Get Your Tax Record**”



- ✓ 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* “**2016**”. 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 2016 Return Transcript. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you.*”

The image shows the IRS 'Get Transcript' form. The 'Type of Transcript' dropdown is set to 'Return Transcript' and the 'Tax Year' dropdown is set to '2016'. A 'Continue' button is visible at the bottom.

IRS OFFICE INFORMATION

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

- ✓ Phone: (800) 829-1040
- ✓ Request a **Tax Return Transcript** for the appropriate aid year.