HOW TO OBTAIN YOUR TAX INFORMATION

NOTE: For 2018-19, we are UNABLE to accept a copy of your original 1040, 1040A, or 1040EZ tax return(s).
You have two options for completing the IRS Tax Documentation process requirement if you filed or are required to file a 2016 IRS tax return. The preferred method is Option 1 - IRS Data Retrieval Tool (DRT) which is done through the FAFSA. If you are unable to use the IRS Data Retrieval Tool, you can then use Option 2 - Requesting a Tax Return Transcript.

Option 1: FAFSA IRS Data Retrieval Tool (DRT) Instructions (Preferred Method)

The preferred method is the IRS Data Retrieval Tool, which is done through the FAFSA.

- If you successfully used the IRS Data Retrieval Tool when you filed your FAFSA, you have already completed this step. Check MySRU to confirm whether or not the tax information requirement has been satisfied.

1. Log in to your current FAFSA form by entering the student’s information; click “Make FAFSA Corrections”; enter the student FSA ID and the password you created when you filed the original FAFSA and click next.
2. Go to the Financial Information tab. Parent tax information is first. Select “Already Completed” and the parents’ tax filing status.
3. Click “Link to IRS”. Select if you are Parent 1 or Parent 2 and log in with the parent FSA ID. Click “Proceed to the IRS SITE” to be transferred to the IRS to retrieve your information.
4. Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the “Submit” button.
5. Check the “Transfer My Tax Information into the FAFSA form” box, and click the “Transfer Now” button.
6. You will know that your federal tax return information has been successfully transferred because the words “Transferred from the IRS” will display in place of the IRS information in your FAFSA form.
7. Enter 2016 wages for Parent 1 and Parent 2, if applicable.
8. Click “Next” and repeat the data retrieval process to retrieve the student tax information if they filed in 2016, before going to the last step. Once you have transferred both the parent and student tax information, if applicable, you are directed back to the FAFSA.
9. YOU ARE NOT DONE! Complete the Sign and Submit section by using both the student and parent FSA ID to electronically sign your FAFSA and remember to click “Submit My FAFSA Now”. You will know your FAFSA has been submitted successfully when you arrive at the Confirmation Page. You will receive a confirmation number and a letter in the mail from the IRS confirming that you have used the IRS Data Retrieval Tool.

Option 2: Tax Return Transcript Instructions

If you are unable or choose not to use the IRS Data Retrieval Tool, please obtain an official 2016 Tax Return Transcript from the IRS. You can order a tax return transcript either by mail, online or by phone. If you are married and filed separate returns or if your biological parents live together and are not married, a tax return transcript is required for both parents. NOTE: If you filed a joint tax return, you MUST use the primary tax payer (top person listed) when requesting the tax transcript by phone or online.

By Phone: Call 1-800-908-9946 to order your 2016 Tax Return Transcript (Option 2 on the menu). See NOTE above.

Online: Go to www.IRS.gov; Click “Get my Tax Record”

- Click “Get Transcript by MAIL”
- Enter your Social Security Number, Date of Birth and Address as listed on your tax return. See NOTE above.
- Request the Return Transcript for 2016. If you select by MAIL, allow 5 to 10 days to receive your transcript by mail.