



2018-19 IRS DATA RETRIEVAL TOOL, TAX RETURN TRANSCRIPT, AND VERIFICATION OF NON-FILING INSTRUCTIONS

The instructions below will assist you in providing acceptable 2016 IRS tax return information.

USING THE IRS DATA RETRIEVAL TOOL

Go to: <https://fafsa.gov>.

1. Click "Login."
2. Enter your (the student's) FSA ID.
3. Click "Make FAFSA Corrections."
4. Create a Save Key and click "Next."
5. Click the "Student Financial Information" tab.
6. Answer the questions on that page regarding your (the student's) tax filing status. You must answer "already completed" to use the IRS Data Retrieval Tool.
7. Click "Link to IRS."
8. Enter your address exactly as it appears on your tax return.
9. Check "Transfer Tax Information into the FAFSA."
10. Click "Transfer Now." (Do not correct any of the data transferred to your FAFSA.)
11. For parent IRS Data Retrieval, click the "Parent Financial Information" tab and repeat steps 6-10 using the parent FSA ID, parent tax filing status, and parent address, exactly as it appears on the parent tax return.
12. Go to the "Sign with an FSA ID" page. Follow the instructions for both parent and student signatures. Click "Submit my FAFSA Now."

Data transferred into the FAFSA from the IRS will be encrypted and hidden from view on both the IRS Data Retrieval Tool website and the FAFSA web pages.

MAKING A REQUEST FOR AN IRS TAX RETURN TRANSCRIPT

If you cannot use the IRS Data Retrieval Tool, please request a copy of your 2016 IRS Tax Return Transcript.

IMPORTANT:

When you receive the IRS Tax Return Transcript, you must write the student's name and Rocket Number on the document prior to submitting it to the Office of Student Financial Aid.

Go to: www.irs.gov/transcript.

If you have a credit card (not debit), auto loan, mortgage, home equity loan, or home equity line of credit **AND** you have a mobile phone billed to your name:

1. Select "Get Transcript Online."
2. Register/Create account.
3. Select reason for transcript request and tax year requested (2016).

If you are unable to use "Get Transcript Online," use one of the following methods:

Get Transcript by MAIL

1. Go to: www.irs.gov/transcript.
2. Select "Get Transcript by Mail."
3. For Married Filing Jointly tax return transcripts, the taxpayer (not the spouse on the return) must make the request.
4. Enter personal data and address used on the tax return submitted to the IRS.
5. Select "Return Transcript" and tax year "2016."

Get Transcript by PHONE

1. Call the IRS at 800.908.9946 to order a transcript.
2. For Married Filing Jointly tax return transcripts, the taxpayer (not the spouse on the return) must make the request.

IMPORTANT:

When you receive the IRS Tax Return Transcript, you must write the student's name and Rocket Number on the document prior to submitting it to the Office of Student Financial Aid.

If you are unable to get your tax return transcript using any of the methods above, you may submit a signed copy of your 2016 Federal Tax Return instead.

CONTINUED ON REVERSE→

MAKING A REQUEST FOR AN IRS VERIFICATION OF NON-FILING LETTER

IMPORTANT:

When you receive the IRS Verification of Non-Filing Letter, you must write the student's name and Rocket Number on the document prior to submitting it to the Office of Student Financial Aid.

Go to: www.irs.gov/transcript.

If you have a credit card (not debit), auto loan, mortgage, home equity loan, or home equity line of credit **AND** you have a mobile phone billed to your name:

1. Select "Get Transcript Online."
2. Register/Create account.
3. Select reason for transcript request and tax year requested (2016).

If you are unable to use "Get Transcript Online" you will need to complete the **IRS Form 4506-T "Request for Transcript of Tax Return"**:

Go to: www.irs.gov/forms-pubs.

1. Select Form 4506-T.
2. Complete lines 1a-1b.
3. Complete lines 3-4.
4. Check box for line 7.
5. Enter "12/31/2016" for line 9.
6. Complete signature section and sign and date form.
7. Fax or mail completed/signed form to applicable fax number or address provided on page 2.

IMPORTANT:

When you receive the IRS Verification of Non-Filing Letter, you must write the student's name and Rocket Number on the document prior to submitting it to the Office of Student Financial Aid.

If you are unable to get your IRS Verification of Non-Filing Letter using either of the methods above, you may submit a signed statement indicating that you attempted to obtain the letter, but you were unable to obtain it.

Questions? Please contact Rocket Solution Central (RSC) at 419.530.8700.

TO SUBMIT DOCUMENTS:

Mail to: The University of Toledo
Office of Student Financial Aid
2801 West Bancroft Street, Mail Stop 314
Toledo, OH 43606-3390

Fax to: 419.530.5835

Upload to: myUT.utoledo.edu
"My Financial Aid"
"Secure Financial Aid Document Upload"