

This option is available to most tax filers about two weeks after you electronically file a federal return (or eight weeks after you file on paper). See back page for specific timelines. However, there are a few scenarios in which students and parents are ineligible to use the IRS DRT, such as:

- The student/parent is married, and either the student/parent or his/her spouse filed as Married Filing Separately.
- The student/parent is married, and either the student/parent or his/her spouse filed as Head of Household.
- The parents' marital status is "Unmarried and both legal parents living together."
- The student/parent filed a Puerto Rican or foreign tax return.

Why does RCC recommend this option? Because it may reduce the amount of documentation you must submit to RCC, streamlining the verification process.

If you've already filed your initial Free Application for Federal Student Aid (FAFSA) for the current school year OR you are now correcting your FAFSA after filing taxes, follow the steps below to use the IRS Data Retrieval Tool (DRT):

- Go to www.FAFSA.gov and click "Login."
- Enter your personal FSA ID login information and click "Next."
- Click on "Make FAFSA corrections."
- Create a SAVE KEY – used for parents who need to also correct tax information before submission.
- At the top of the page, click on the "Financial Information" tab.
- Ensure your tax filing status is "Already Completed" and select HOW you filed (single, married, etc...)
- Answer the Y/N question(s) to determine eligibility to use the IRS Data Retrieval Tool.
- Click the "Link to IRS" button then "Proceed to IRS site" then "OK" once you get to the IRS site.
- Enter your tax filing status & address EXACTLY as it appears on your Federal tax return.
- Check the box to "Transfer my tax information into the FAFSA."
- Click "Transfer Now."
- Update any additional income questions (income earned from work, specifically) to match taxes.
- View your successful transfer page and confirm the information is accurate. (Changing information that is transferred from the IRS will invalidate the Data Retrieval Tool.)
- At the top of the page click the "Sign & Submit" tab.
- View the corrections you made and click "Next."
- Click the box next to "Agree" then "Sign."
- Click "Submit My FAFSA Now."
- Print the confirmation page if you choose, click "Exit" and logout at the top of the screen. Corrections take 3-5 days to process and to be received by RCC.

Obtaining a 2016 Tax Return Transcript and Wage & Income Transcripts

If you are unable to use the Data Retrieval tool, here are your options:

- Option 1) Order the Tax Return Transcript online at www.irs.gov. Click on “Get My Tax Record” then either “Get Transcript Online” or “Get Transcript by Mail.” **Please note:** the Wage/Income Transcripts may not be available to order online. You may need to submit the 4506-T form as described in Option 3. You may also submit original W-2 and 1099 forms in lieu of the Wage/Income Transcripts if unable to obtain.
- Option 2) Call 1 (800) 905-9946 to request the transcripts from the IRS over the phone (mailed to you).
- Option 3) Submit completed **IRS Form 4506-T** from www.irs.gov directly to the IRS. When completing the form, be sure to request the following: Tax Return Transcript (Item 6a) and the “Form W-2, Form 1099 series... (Item 8). Choose the applicable “Year or period requested” in option 9. Students may submit original W-2 and 1099 forms in lieu of Item 8 as described above.
- Option 4) **Visit an IRS office** in person to request a hard copy of the Tax Return Transcript and Wage/Income Transcripts (required for both filers in the instance of joint return). Each filer will need to obtain his/her own Wage/Income transcript.

MEDFORD IRS BRANCH located at:

960 Ellendale Drive Medford OR 97504

(844) 545-5640

Open Monday - Friday 8:30 am - 4:30 pm (Closed 12:30 pm - 1:30 pm for lunch).

****The IRS office in Medford REQUIRES an appointment if requesting Tax Return and/or Wage and Income Transcripts. ****