

This option is available to most tax filers about two weeks after electronically filing a federal return (or eight weeks after filing on paper). Exceptions may include the following:


- You owe (and the IRS hasn't processed your payment yet), or
- You are not the primary filer on your tax return, or
- You are married filing separate or separated filing jointly, or
- You are filing a foreign 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) using a desktop/laptop computer:**




- Go to [fafsa.ed.gov](https://fafsa.ed.gov) and click "Login"
- Click "I am the student" (or the other option if you are someone other than the student)
- Enter your personal FSA ID login information and click "Next"
- Click on "Make FAFSA corrections" (make sure you're looking at the 2020/2021 FAFSA)
- Create a SAVE KEY then click "Next"
- Click "OK" when it tells you it's taking you away from the current web page.
- At the top of the page, click on the "Financial Information" tab.
- Ensure tax filing status is "Already Completed" and HOW you filed (single, married, etc...) is accurate.
- If it asks for clarification about filing an amended or Puerto Rican tax return, answer as applicable to determine your eligibility to use the IRS Data Retrieval Tool. If it lets you move forward, next step.
- 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 return then "Submit"
- Check the box to "Transfer my tax information into the FAFSA form"
- Click "Transfer Now" which should send you back to the FAFSA site, showing "Transferred from the IRS" next to each section it transferred.
- Double check/update any additional income questions (income earned from work, specifically) that wasn't transferred from the IRS, including answering if you (or spouse) were a dislocated worker.
- (If you are a dependent student whose parent wants to use the DRT, make sure to follow the steps above to link it for both student and parent.)
- 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.

If you are unable to use the Data Retrieval tool, you will need to provide a copy of your 2018 Tax Return Transcript. Here are your options to get it:

 **Taxpayer Assistance Center**

# Need a Tax Return Transcript?

We offer 3 Easy Options

-  **1** **Online** — Go to [IRS.gov/transcript](https://www.irs.gov/transcript) to download a copy of your tax return transcript immediately. 
-  **2** **Mail** — You can use the Get Transcript by Mail online at [IRS.gov/transcript](https://www.irs.gov/transcript) or complete **Form 4506-T** to request your tax account transcript or **Form 4506T-EZ** to get your tax return transcript and mail it to the IRS. **Form 4506-T** is available at [IRS.gov/form4506t](https://www.irs.gov/form4506t). **Form 4506T-EZ** is available at [IRS.gov/form4506tez](https://www.irs.gov/form4506tez).
-  **3** **Call** — **800-908-9946** and follow the voice prompts.

Transcripts sent to your home address will be mailed free of charge. Please allow 5 - 10 calendar days from the time the IRS receives the request for delivery.

You can order an exact copy of a previously filed and processed tax return, including attachments and **Form W-2**, by completing **Form 4506, Request for Copy of Tax Return**. Mail the completed form with \$50 for each tax year requested to the address in the instructions. **Form 4506** is available at [IRS.gov/form4506](https://www.irs.gov/form4506). Generally copies are available for the current year and the past six years. Either spouse can submit and sign **Form 4506** to request copies of jointly filed tax returns. Allow 75 calendar days to receive your copies.

Or visit an IRS office in person to request a hard copy of the Tax Return Transcript.

**MEDFORD IRS BRANCH located at:** 960 Ellendale Ave Medford OR 97504

Appointments: (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 Transcripts\*\***