

Benedict College Office of Student Financial Aid and Scholarships

VERIFICATION: IRS DATA RETRIEVAL INSTRUCTIONS

If you were selected for verification you must verify your tax information supplied on the FAFSA. You can have your IRS Tax information verified through the “IRS Data Retrieval.”

1. **POINT** your web browser to <http://www.fafsa.ed.gov>
2. **CLICK** on “Start Here”
 - o You must enter your first name, last name, SSN, and your date of birth.
 - o Click “Next”
3. **Select** the “2019-2020” tab
4. **Scroll** down and select “Make FAFSA Corrections”
 - o **You must enter your FSA ID** (To create a FSA ID, if you do not already have one, select the “Create FSA ID” link).
 - o You must **create a Safe Key**.
 - o **Click “Next”**
5. **Select “Financial Information”** from the bar across the top.
 - o The “IRS Data Retrieval” screen appears
 - o Select “Already Completed” from the drop down menu
 - o Five Yes/No questions will be asked. If you answer “Yes” to any of these then you will need to request an IRS Tax Transcript. The instructions are below.
 - o If Dependent, select your parent and enter his or her FSA ID.
 - o If Independent, enter your FSA ID.
 - o Click on “Link to IRS”.
6. **A page will come up warning that you are about to leave the FAFSA website. Continue to the next page.**
7. **Follow the on-screen instructions.**
8. **If you are told that your IRS Tax information is not available, you will have to order a Tax Transcript.**
9. **If your data is available you will be asked to verify some information.**
 - o Confirm your name, Select your TAX Filing status, Enter the address you used on your taxes.
 - o Click “Submit”
 - o A screen should appear telling you what information will transfer into your FAFSA, review this.
 - o Select the check box for “Transfer my Tax Information into my FAFSA”.
 - o Click on “Transfer Now”
10. **The information will update the FAFSA and you will be returned to the FAFSA website.**
 - o Review your changes, select “Next” when ready.
 - o If you are a “Dependent” student you will need to complete steps 5-9 for both the student and a parent.
11. **You will be at the “Sign and Submit” section.**
 - o You may be asked to enter your FSA ID, select “Agree”, and click on “Sign”
 - o Repeat this step for each person whose information you are updating: Mother, Father, etc...
 - o **Select “Submit my FAFSA now”**
12. **You will get a confirmation page. Print or Save this for your records.**
 - o Select “Exit” at the bottom of the page.
 - o Select “Logout” at the top of the page.
13. **Your updated information will be sent to the financial aid office.**
14. **Complete the Verification Worksheet if you have not already done so.**

MATCH UNSUCCESSFUL?

 - If you receive notification that there was no match in the IRS database you should double check your filing status and address you provided to make sure they match your taxes.
 - If that doesn’t resolve the problem you may need to order an IRS Tax Transcript from <http://IRS.gov> . Just click on “[Get Transcript of Your Tax Record](#)”. Be sure to order a “Tax Return Transcript”.
 - If that is unsuccessful you can attain a Tax Return Transcript from an IRS Office; which can be located using this site: <http://apps.irs.gov/app/officeLocator/index.jsp>
 - You may want to re-attempt this process a week later, as it may be a timing issue.

The screenshot shows the 'Parent Financial Information' section of the FAFSA website. It includes a search bar at the top, a navigation menu with tabs for Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Financial Information' tab is active. The main content area asks for 2014 tax information, including whether the parent has completed their return, their filing status (Head of Household), and whether they filed electronically. There are radio buttons for 'Yes' and 'No' for several questions. A 'LINK TO IRS' button is visible at the bottom. A 'Help and Hints' sidebar on the right provides instructions on how to use the IRS Data Retrieval Tool and how to create an FSA ID.

See instructions on back for ordering the forms directly from the IRS

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How to Obtain a Free Tax Return Transcript from the IRS

If your FAFSA is selected for verification, and you did not use the IRS Data Retrieval option or you changed the IRS data, you will be required to request a tax transcript from IRS and submit it to the Office of Student Financial Aid and Scholarships. **Personal copies of tax returns can no longer be accepted.**

Three ways to request your Tax Transcript: by phone, online, or by mail. Please make sure you request a **Tax Transcript**. **DO NOT** request a Tax Account Transcript or Record of Account because they cannot be used for financial aid verification purposes.

OPTION 1: To Order by Phone:

Live Person to Request Transcript by Fax

- Call the IRS at 1-800-829-1040 then select the following prompts:
- Option 1 (For English)
- Press 2 for questions about your Personal Income Taxes
- Press 0 for questions about a form you already submitted or tax history
- Press 0 to Request your tax Return transcript
- You will be placed on hold for the next available representative (Be prepared to be on hold for a while).
- Request a copy of your Tax Transcript and indicate which year (i.e. 2017) to be faxed to you. (You must be at the fax # in order for the IRS to fax a copy of your Tax Return Transcript to you).

To Order by Phone Via Automated System

- Call the IRS at 1-800-908-9946 then select the following prompts:
- Option 1 (For English)
- Enter and verify Social Security number (if joint return both SSN's required)
- Press 1 if correct
- Enter and verify number of street address
- Press 2 for Tax Transcript and indicate which year (i.e. 2017).
- Your transcript(s) will be mailed within 5 to 10 days from the IRS

OPTION 2: To View Online and Print

- Go to www.irs.gov then select the following:
- Under Tools, Click "Get Transcript of Your Tax Records"
- Click Get Transcript Online
- Create an account if you don't have one already
- Enter your Name and Email Address, then Click Continue
- An Email confirmation code will be sent to your Email
- Enter your confirmation code, and then select Verify Email Confirmation Code
- Enter your personal information (information must match your most recently filed tax return)
- Click Continue
- Answer the questions to ensure that you are the right person. All fields are required.
- Click Continue (If your answers are correct, you will proceed to the next step)
- Select the reason you are requesting a transcript, Select "Higher Education/Student Aid Return Transcript will be highlighted, Select "2017"
- You will be able to view and print your Tax Transcript.
- Print all of the pages and if this is a parent tax transcript, write the student's name on the top of the first page and on the fax cover sheet and fax it to the Office of Student Financial Aid and Scholarships at 803-705-6629 or mail it to the Office of Student Financial Aid and Scholarships, Benedict College, 1600 Harden Street, Columbia, SC 29204
- Click Sign-out on the top right hand corner
- For security purposes, Close Your Browser when you are done.

OPTION 3: To Order by Mail

- Complete Form 4506-T (Request for Transcript of Tax Return)
- Form 4506-T is available online at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- Mail to the address indicated on the form
- In Item 5 List Benedict College and the following address: c/o Office of Student Financial Aid and Scholarships, 1600 Harden Street, Columbia, SC 29204
- Your tax transcript(s) will be mailed within 5 to 10 days from the IRS