

Eligibility Requirements for the IRS Data Retrieval Tool

Determine whether you are eligible to use the IRS Data Retrieval Tool (DRT Tool).

It is important to note that to successfully use the DRT Tool, you must have **both**:

- A valid Social Security Number and legal name match *and*
- Filed a 2013 Federal Tax Return

Also:

If Any of These Apply to you:	<ul style="list-style-type: none">• Applied for a 2013 Federal Tax Filing Extension• Filed or will file an Amended 2013 Tax Return• Filed a Puerto Rican or foreign tax return• Filed return using a Tax ID Number (TIN)• Tax Transcript not obtainable due to Victim of IRS Identity Theft• Filed return Married Filing Separately• Filed return Married Filing Head of Household• Marital status from 1/1/ 2014 through 5/10/2015 has changed	Then... You are <i>NOT eligible</i> to use the DRT tool. Follow the instructions here.
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Applicant and/or Parent Eligible to Transfer Data

If you are eligible to transfer the 2013 tax data from the IRS to the 2014-15 FAFSA, follow the tutorial and these instructions:

- Visit fafsa.gov. Login to the site then choose "Make FAFSA Corrections"
- Enter your Federal Student Aid PIN
- Navigate to Parent Financial Information, enter Parent PIN
- Choose "Link to IRS". After reviewing your information, choose "Transfer Now"
- Navigate to Student Financial Information. Follow steps for student tax data

How to Request a Tax Return Transcript, 2014-15

Tax filers can request a transcript of their 2013 tax return, free of charge, from the IRS in one of three ways:

Online Request

Available at www.irs.gov

- Under Tools, click "Order a Return or Account Transcript"
- Click "Order a Transcript"
- Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. ([Problems entering your street address?](#))
- Click "Continue"
- **Select "Tax Return Transcript"** (not "Tax Account Transcript") and in the Tax Year field, **select "2013"**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request within 5 to 10 days.
- Sign and submit the tax return transcript to Marquette; make sure to include the student's name and MUID on the transcript.

Telephone Request

Available from the IRS by calling **1-800-908-9946**

- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. ([Problems entering your street address?](#))
- Select **"Option 2"** to request an IRS Tax Return Transcript (not "Tax Account Transcript") and then enter **"2013"**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address provided in their telephone request within 5 to 10 days from the time of the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.
- Sign and submit the tax return transcript to Marquette; make sure to include the student's name and MUID on the transcript.

Paper Request Form – IRS Form 4506T-EZ

Download IRS Form 4506T-EZ at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf> 

- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 3: enter the tax filer's street address and zip or postal code. Use the address currently on file with the IRS. ([Problems entering your street address?](#))
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. Do not have your Tax Return Transcript sent directly to Marquette.
- Line 6: in the Tax Year field, **enter "2013"**.
- The tax filer must sign and date the form and enter their telephone number. Only one signature is required when requesting a joint tax return transcript.
- Mail or fax the completed IRS Form 4506T-EZ to the address (or FAX number) provided on page 2 of Form 4506T-EZ.
- If the 4506T-EZ information is successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address provided on their request within 5 to 10 days.
- Sign and submit the tax return transcript to Marquette; make sure to include the student's name and MUID on the transcript.