IRS Data Retrieval Option for 2015-16 FAFSA

Students and parents may use "estimated income" information on the initial FAFSA. Beginning late February 2015, you will be able to select the IRS Data Retrieval option on your FAFSA. We strongly recommend that parents and students select this option when filing the initial FAFSA or when subsequent corrections are made to your 2015-16 FAFSA application. This option will streamline and expedite the processing of your financial aid application.

In order to successfully use the IRS Data Retrieval option, you must have:

- A federal tax return filed with the IRS. Electronically filed tax return information will be available online from the IRS site two weeks after the return has been filed. Data from paper tax returns will be available eight weeks after filing with the IRS.
- A valid Social Security number
- Federal Aid Personal Identification Number (PIN) that you can apply for during the FAFSA process
- An unchanged marital status since December 31, 2014

To use the IRS Data Retrieval, return to the FAFSA on the web at: www.fafsa.ed.gov to access the FAFSA Corrections process. Change your tax filing status to “Already Completed”. A box called “Link to the IRS” will become available for you to click on:

- Enter the PIN number of the person whose tax information you are retrieving.
- Click “Link To IRS”.
- Your FAFSA will be saved and you will be transferred to the IRS Web site.
- On the IRS Web site, enter the requested information. Verify that this information exactly matches the identifying information used on the tax form and then click submit.
- Once the IRS has validated your identification, your IRS tax information will display for you to review. The FAFSA questions that are populated with “Transferred from the IRS” will transfer to your FAFSA. Do not make changes to information marked “Transferred from the IRS”.
- Make sure to update your/parent(s) wages earned if not accurate, as this information may not be transferred from the IRS.
- Check the box that says, “Transfer My Tax Information into the FAFSA” and click on the “Transfer Now” button.
- Submit your FAFSA with the corrections.

The Data Retrieval Process cannot be used in the following circumstances:

- Parents or students who are married and filed a “Married Filing Separately” federal tax return
- Unmarried parents living together
- Married and filed as Head of Household
- Marital status changed after December 31
- Parents with all zeroes for SSN
- Filed an amended tax return
- Filed a Puerto Rican or foreign tax return
VERIFICATION OF TAX INFORMATION

**IRS Data Retrieval through the FAFSA:**
Use the IRS Data Retrieval Process to submit correct tax information. The IRS Data Retrieval Tool is available 2 weeks after filing tax return electronically or 8 weeks after filing a return by mail. You will not be required to submit a federal tax return transcript once our office receives the unaltered retrieved IRS information. This option will streamline and expedite the processing of your financial aid application. For instructions, view IRS Data Retrieval under Tools on our website: www/csuchico.edu/fa

**OR**

If you are unable to use the IRS Data Retrieval Process, you will be required to submit a Federal Tax Return Transcript. Tax Account Transcripts or copies of your 1040 are not acceptable. Tax Filers may now obtain a federal Tax Return Transcript two weeks after filing tax return electronically or 8 weeks after filing tax return by mail.

**Requesting Tax Return Transcripts:**

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<td>Get Transcript Online</td>
<td>Same Day*</td>
<td>No</td>
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<td>Get Transcript by Mail</td>
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<td>Mailed</td>
<td>5-10 days*</td>
<td>No</td>
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<tr>
<td>Telephone</td>
<td>(800) 908-9946</td>
<td>Paper</td>
<td>Mailed</td>
<td>5-10 days*</td>
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<td>Paper</td>
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Do not request delivery directly to our office. Please submit a copy of the federal tax return transcript with the student’s name and Chico State ID printed at the top right corner of each page. If you fax a transcript to our office, please be aware that tax return transcripts are two-sided.