

Culver-Stockton College  
IRS DATA RETRIEVAL/TAX RETURN TRANSCRIPT

Anyone that is married and filed separate tax returns cannot use the online data transfer; you must submit paper Tax Return Transcripts.

**Transfer Tax Information Electronically Using IRS DATA RETRIEVAL TOOL – THIS IS THE EASIEST AND FASTEST!!!**

- Go to [www.fafsa.gov](http://www.fafsa.gov).
- Log in using the student's FSA ID, and select make a correction.
- Go to the financial tab and select 'already completed' for the tax return filing status and answer the three eligibility questions. (If you answer yes to any of these questions, you are not eligible to use the tax transfer.)
- To transfer parent financial information, parent will need to have their FSA ID ready (after logging in to the FAFSA with the student FSA ID).
- Click on 'LINK TO IRS'. You will leave the FAFSA website and another window will open. Do NOT close out on any of the windows.
- Click 'OK' to accept the IRS Data Retrieval Tool terms of use.
- Enter your address EXACTLY as it appears on your taxes, and click 'Submit'.
- Review the information that the IRS has retrieved from your tax returns.
- Check the box to 'transfer my tax information into the FAFSA' and click 'Transfer Now'.
- Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.
- DO NOT change any answers that say 'Transferred from the IRS'.
- Answer the additional questions and click 'Next'.
  - NOTE: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financial Information Section and once under the Parent Financial Information Section before submitting the FAFSA.
- Continue to the 'Sign & Submit' tab and follow the instructions to submit your FAFSA correction. BOTH student and parent will need to electronically sign the FAFSA when making corrections or the FAFSA will be rejected.

If this process is not successful, you must order a transcript as described below.

**Get Paper IRS TAX RETURN TRANSCRIPT or VERIFICATION OF NON-FILING LETTER by Mail**

This allows you to request a copy online, and a paper copy will be mailed only to the address shown on the tax return.

- Go to [www.irs.gov](http://www.irs.gov).
- In the Tools section, click on **Get a Tax Transcript**.
- Click **Get Transcript by MAIL**.
- Enter the tax filer's Social Security Number, date of birth, street address, and zip code. If you filed a joint return, it is more likely to work correctly if you use the information for the first person listed on the tax return. If you do not enter your address EXACTLY the same way it was entered on your tax return the IRS will not be able to process your request. Click **Continue**.
- In the Type of Transcript field, select **Return Transcript** and in the Tax Year field, select **2015**.
- 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.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

You may email the transcript to [financialaid@culver.edu](mailto:financialaid@culver.edu), fax to 573-288-6308, or mail to:

Culver-Stockton College  
Attn: Financial Aid  
One College Hill  
Canton, MO 63435

### **Get IRS TAX RETURN TRANSCRIPT On Demand**

This allows you to request an immediate copy on the IRS website, and you can view, print, and download your transcript. We recommend saving the file as a .pdf file on your computer.

- Go to [www.irs.gov](http://www.irs.gov).
- In the Tools section, click on **Get a Tax Transcript**.
- Click **Get Transcript ONLINE**.
- To register and use this service, you need the following. If you do NOT have any of these, you will need to use one of the other options to submit your transcript.
  - ✓ your **SSN**, date of birth, filing status and mailing address from latest tax return,
  - ✓ access to your email account,
  - ✓ your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
  - ✓ a mobile phone with your name on the account.
- You will need to set up an account.
- Enter your first name and last name exactly as it appears on your 2015 tax return, and a valid email address that you can access during this process. Click **Send Code**. They will send an email to your email address. Do NOT close out of this window. The code expires in 15 minutes. Enter the code on the screen, and click **Next**.
- Next you will verify your personal information. Enter your date of birth, social security number, tax filing status, and the address shown on your 2015 tax return. If you do not enter your address EXACTLY the same way it was entered on your tax return the IRS will not be able to process your request. Click **Continue**.
- Next you will verify a financial account number. Enter one of the numbers they ask for on the screen (last 8 digits of credit card number, auto loan account number, mortgage number, or home equity line of credit). Click **Continue**.
- Next you will verify your phone number. Enter your cell phone number, then click **Send Message**. Do NOT close out of this window. Enter the 6-digit activation code from your text, then click **Continue**.
- Next create a username and password. Create a Site Phrase and Site Image, then click **Continue**. If the screen shows that you successfully validated your identity and created an account, you can now request a transcript.
- Select the reason you need a transcript as “Higher Education/Student Aid”, and click **Continue**.
- In the Return Transcript box, choose the link for **2015**. If you have a pop-up blocker, you will need to turn it off in order to view the transcript.
- Save the file as a .pdf to your computer, or print the file. If you attempt to copy the web address of the current page and email it, it will NOT work.

### **Request VERIFICATION OF NON-FILING LETTER**

Starting with the 2017-18 school year, the Department of Education requires that a non-tax filer submit proof that a parent/student did not file taxes. In order to complete this requirement, you must fax a Form 4506-T to the IRS. They will mail a copy within 5-10 business days.

- Go to [www.irs.gov](http://www.irs.gov). In the search box, type 4506-T. This form is a fillable .pdf form.
- Enter your name, social security number and current address.
- To send the request directly to the college, enter in Line 5
  - Culver-Stockton College, 1 College Hill, Canton, MO 63435
- If you do not want to send the request directly to the college, leave Line 5 blank.
- Check the box at the end of Line 7 to request a Verification of Nonfiling.
- In Line 9, enter the 12/31/2015 for the ending date of the year requested.
- Sign and date the form.
- Fax the form to the number as shown on the directions.