

2017-2018 IRS DATA RETRIEVAL & IRS TAX RETURN INSTRUCTIONS

Pierpont Community & Technical College compares all student and parent tax information submitted on the FAFSA against IRS data to make sure that financial aid eligibility is determined using accurate figures. The most efficient way for you to provide this information is to use the IRS DATA RETRIEVAL feature on the FAFSA. The procedure is outlined below. If your tax information is not available at the time you are completing your FAFSA, you should update the FAFSA using the IRS data retrieval when your tax information is available. If you file an electronic tax return, your IRS data could be available for transfer as soon as two weeks after filing. Once you have transferred your IRS tax information to your FAFSA, the questions that are populated with tax information will be marked with "Transferred from the IRS." **Do not make any changes to the transferred data.**

The benefit of utilizing the IRS Data Retrieval Process is that it will greatly simplify and expedite the verification process. You will not have to submit a copy of your Tax Return Transcript to our office before we can finalize your federal aid eligibility.

HOW THE IRS DATA RETRIEVAL TOOL WORKS:

- 1) When answering the FAFSA questions about the student's and parent's previous year's taxable income select the option to download information from the IRS.
- 2) Your FAFSA will be saved and you will be transferred to the IRS website.
- 3) On the IRS website, enter the requested information, select and click submit. Note: The data entered **must** match the information on your tax return.
- 4) Once the IRS has validated your identification, your IRS tax information will display. Transfer your information from the IRS to your FAFSA by clicking the selection box on the left of the first option to transfer the data and then the submit button on the right.
- 5) You will be returned to your FAFSA. The transferred IRS tax information questions will be marked with "Transferred from the IRS."
- 6) Do not make any changes to the transferred data.** You will not be eligible to use the IRS data retrieval tool if you are married but filed separate tax returns; you filed a foreign tax return; or you filed an amended return and will need to request an IRS Tax Return Transcript.

HOW TO OBTAIN A TAX RETURN TRANSCRIPT (If you are not eligible for IRS Data Retrieval)

BY PHONE

- Call the IRS at (800) 908-9946 and follow the prompts to enter the Social Security number and numbers of the street address as it appears on your 2015 tax return.
- Select "Option 2" to request the transcript and enter 2015.

BY MAIL

- Complete IRS Form 4506T-EZ and mail or fax the form to the IRS. The Financial Aid Office can provide this form or you may download it from www.irs.gov.
- You should receive the Transcript within 5 – 10 days or have the option to send it directly to the school.

Online

- Use the following link <https://www.irs.gov/individuals/get-transcript>

NON- TAX FILERS – Dependent Students

PARENT(S) CERTIFICATION OF NON-FILING

If your parent(s) did not and is/are not required to file a federal income tax return, please complete the Non-Filer Statement in Section C of the Dependent Verification Worksheet. Attach copies of their 2015 W2's and/or 1099 forms if applicable.

STUDENT CERTIFICATION OF NON FILING

If you did not and are not required to file a federal income tax return, please complete the Non-Filer Statement in Section C of the Verification Worksheet. Attach copies of your 2015 W2's and/or 1099 forms if applicable.

NON- TAX FILERS – Independent Students

If you and/or your spouse did not and were not required to file a federal income tax return, please complete the Non-Filer Statement in Section C of the Independent Verification Worksheet. Attach copies of 2015 W2's or 1099's if applicable.

Please send all completed documents to:

Pierpont Community & Technical College
Attn: Office of Financial Aid
1201 Locust Avenue
Fairmont, WV 26554

FAX: 304-367-4881

EMAIL: financialaid@pierpont.edu

Questions? You may also call (855) 297-0999 or (304) 367-4907.