POINT PARK UNIVERSITY

2019-2020 IRS Tax Retrieval Instructions

The federal verification process requires a review of your 2019-2020 Free Application for Federal Student Aid (FAFSA). There are different methods you can access to obtain the 2017 required IRS Tax Return Transcript information. The recommended way to provide accurate 2017 IRS tax information is by utilizing the IRS Data Retrieval Tool (DRT) on FAFSA. **POINT PARK CANNOT ACCEPT A COPY OF YOUR 2017 IRS 1040, 1040A, or 1040EZ TAX RETURN(S).**

INSTRUCTIONS TO ACCESS THE IRS DATA RETRIEVAL TOOL (DRT) VIA FAFSA ON THE WEB

- Income can be verified for the FAFSA through the usage of the IRS Data Retrieval Tool (DRT) that is a part of the FAFSA on the web at www.fafsa.gov The next step is to LOG IN as a RETURNING USER and CORRECT information for either parent or student.
- Locate the FINANCIAL INFORMATION tab for either PARENT or STUDENT. Select ALREADY COMPLETED from the drop down box indicating that taxes were filed. Answer YES or NO to a series of eligibility questions for data retrieval. If you answered YES, you will not be able to use the IRS DRT. If you answered NO, enter parent or student FSA ID and click LINK TO IRS. A message will display "leaving FAFSA on the Web" because you are going to the IRS website. Click OK. Next click TRANSFER NOW for the 2017 IRS income tax information. After successful transfer, go to SIGN & SUBMIT tab/agree to terms. Click SUBMIT MY FAFSA. **This process will generate an updated FAFSA to Point Park University. As a result of using the IRS DRT successfully, the IRS tax return transcript will not be required. For web assistance from FAFSA, please call 1-800-433-3243.**

INSTRUCTIONS IF UNABLE TO USE THE IRS DRT TOOL – TELEPHONE REQUEST

- Tax filers can request a **2017 TAX RETURN TRANSCRIPT, (Do not select tax account transcript),** free of charge, from the IRS by calling 1-800-908-9946. Information needed would be tax filer's social security number, date of birth, street address, and zip code.

INSTRUCTIONS IF UNABLE TO USE THE IRS DRT TOOL – ONLINE REQUEST

- Tax filers can request a **2017 TAX RETURN TRANSCRIPT, (Do not select tax account transcript),** free of charge, from the IRS by downloading your tax return transcript at Get Transcript Online   OR   by requesting the **2017 IRS TAX RETURN TRANSCRIPT** to be mailed.

http://www.irs.gov/Individuals/Get-Transcript

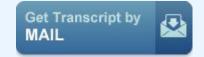| Get Transcript ONLINE	Get Transcript by MAIL
What You Need To register and use this service, you need: ‣ your SSN, date of birth, filing status and mailing address from latest tax return, ‣ access to your email account, ‣ your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and ‣ a mobile phone with your name on the account. **What You Get** ‣ All transcript types are available online ‣ View, print or download your transcript ‣ Username and password to return later	**What You Need** To use this service, you need your: ‣ SSN or Individual Tax Identification Number (ITIN), ‣ date of birth, and ‣ mailing address from your latest tax return **What You Get** ‣ Return or Account transcript types delivered by mail ‣ Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you

DOCUMENTS SUBMITTED TO THE OFFICE OF FINANCIAL AID MUST CONTAIN YOUR POINT PARK STUDENT ID NUMBER