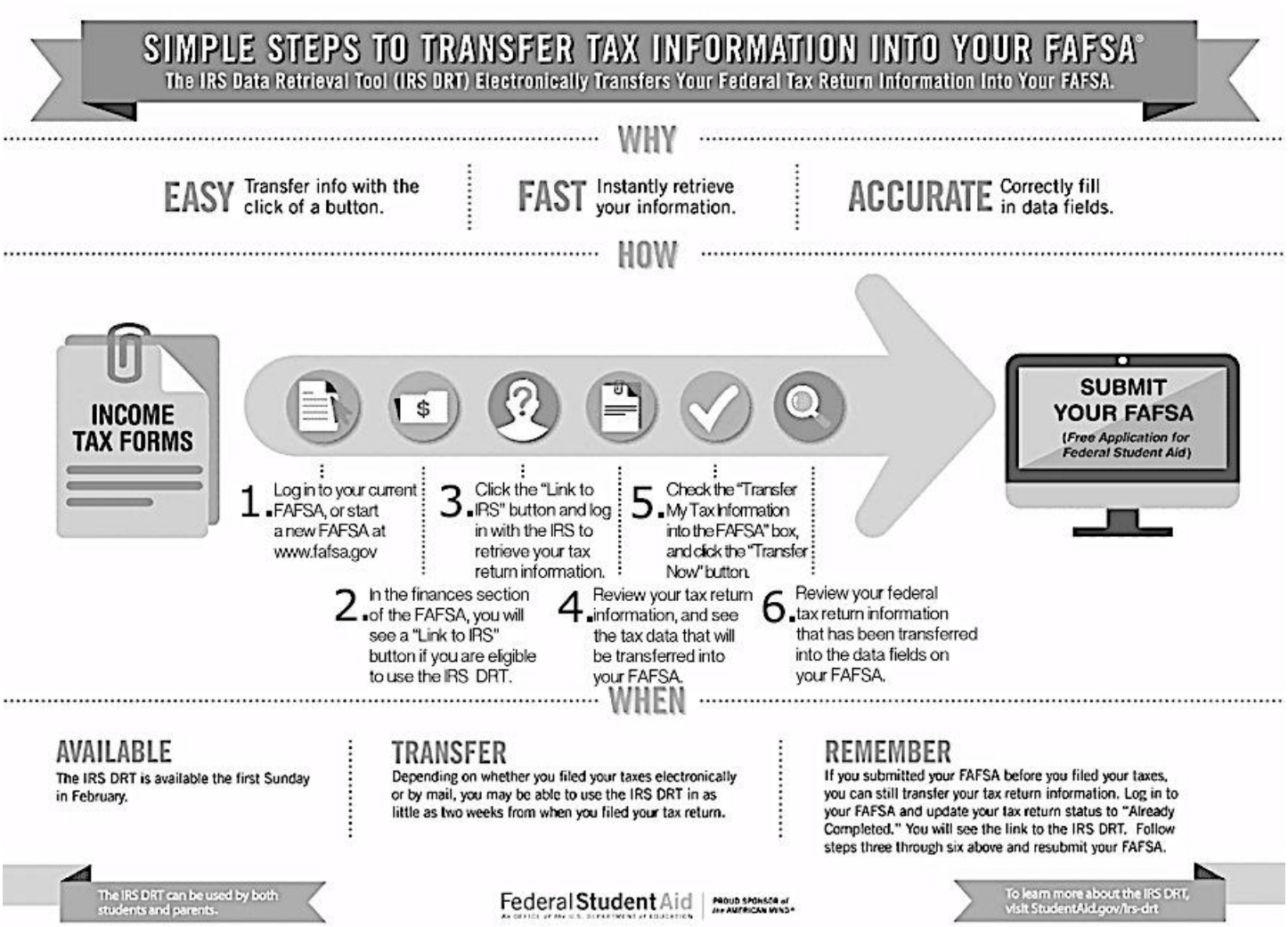
Information Regarding the FAFSA Data Retrieval (DRT) Process for Tax Filers

Quick and Easy….. Just LINK IT!!

The FAFSA process includes the ability for most federal income tax filers to import certain information from their federal tax return into the FAFSA application, a process called "IRS Data Retrieval". This can be done upon submission of the original FAFSA on the Web, or when the applicant electronically corrects the data. If you used this process when completing/correcting your FAFSA you do not need to submit copies of your Federal tax return unless specifically requested to do so in a letter sent by us.



Please see the reverse side for instructions on "How to Request an IRS Tax Return Transcript" if you are unable or do not wish to utilize the IRS Data Retrieval Process.

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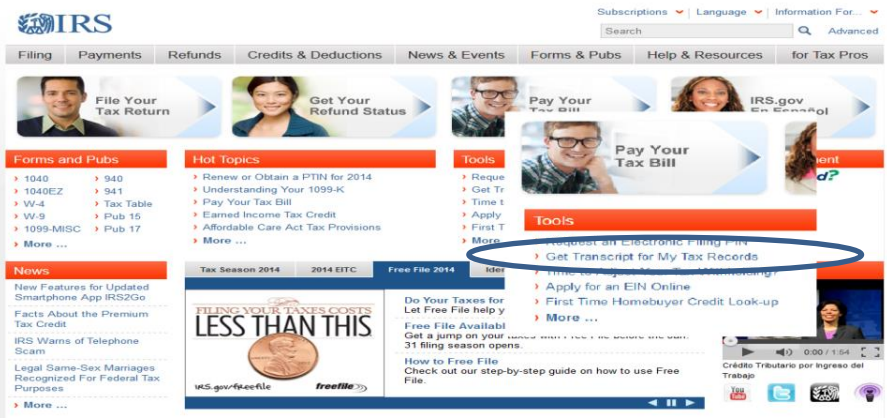
Instructions on How to Request an IRS Tax Return Transcript

If you cannot utilize the "IRS Data Retrieval" tool and we have requested that you, your spouse, and/or your parents submit a copy of your 2014 Federal tax return transcript to our office, you must obtain an IRS **tax return transcript** that lists your tax return information from the IRS. You may contact the IRS to obtain your transcript in the following ways:

Online:
At www.irs.gov go to the 'Tools' section and click "***Get Transcript of Your Tax Records***".



A new window will open titled "Get Transcript", Select "***Get Transcript Online***"-Must be an **IRS Tax Return Transcript**. (**Note:** If you are a new user once you have clicked on *Get Transcript Online*, click on "Create an Account" and follow the prompts. If you already have an account, enter your User ID and click "Sign In." After you sign in, you will see the "Get Transcript" window, Select Higher Education/Student Aid and Select the appropriate year that applies to you.) Once authenticated, you can display the tax transcript as a PDF document. You can view, download and print your transcript immediately.

Telephone:
Call the IRS at 1-800-908-9946 and follow the prompts to enter your personal data. When prompted, select "Option 2" to request an IRS **Tax Return Transcript** and then enter "2014".

Paper Request: Form-IRS Form 4506T-EZ:
Download this form at www.irs.gov/pub/irs-pdf/f4506tez.pdf. Complete the required items, and mail or fax the form to the address provided on the form. Although this form provides an option to have your tax transcript sent directly to Adelphi, you should have it mailed directly to you so you can submit it with your Adelphi ID written on top. We cannot always match information we receive from the IRS to the correct financial aid applicant.

If you have any questions concerning the FAFSA IRS Data Retrieval process please contact us at 516-877-3080. We will be happy to assist you with this, or any other financial aid questions you may have.