

Instructions for IRS Data Retrieval OR Tax Return Transcript (REQUIRED IF SELECTED FOR VERIFICATION)

If selected for verification, new Federal regulations require transferring your income tax information by using the IRS Data Retrieval Tool available on the FAFSA website or by submitting Tax Transcripts to Stonehill College. *Filing your tax returns electronically and early is recommended.* **Please note Stonehill College also requires additional documentation, including but not limited to Student and Parent 2013 W-2s and Student and Parent 2013 signed federal tax returns with schedules to complete the verification process.** Incoming committed students and returning students should monitor their myHill account frequently to view the status of requested documents.

If you answer yes to any of the following statements, you are **NOT ELIGIBLE** to use the IRS Data Retrieval Tool; therefore, you must submit a Tax Return Transcript to Stonehill College.

- My tax filing status is Married Filing Separately
- I filed an amended tax return
- I filed a Puerto Rican or foreign tax return

IRS Data Retrieval Process (preferred method, if eligible)

The IRS Data Retrieval Tool is not available until two weeks after submitting your tax return electronically or up to eight weeks after submitting a paper tax return to the IRS.

1. Go to www.fafsa.gov
 2. Log in to the student's FAFSA record
 3. Select "FAFSA Corrections" and navigate to the Financial Information section of the form
 4. Answer the filtering questions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA
 5. If eligible, the parent will be asked for their Federal Student Aid Pin before linking to the IRS Website.
 6. Follow the online instructions to complete the IRS Data Retrieval process.
- **Note:** Please make sure to submit the FAFSA after completing this process.

Please note that when using data retrieval for a joint tax return; please make sure to use the first name that is listed on the tax return to search for the data. (I.E. If John Smith and Sarah Smith filed a tax return together, they would enter John Smith's name when using data retrieval, since it was listed first on the tax return).

OR

How to Request a Tax Transcript

Online Tax Return Transcript

1. Go to www.irs.gov
2. Under tools, click on "Get Transcript of your tax records"
3. Select either "Get Transcript Online" or "Get Transcript by Mail" (**ONLINE IS PREFERRED FOR QUICK TURNAROUND TIME**)
4. The *online* option will have you create an account for the tax filer on the site. **Important:** Enter name and address information exactly as it appears on your tax return.
5. Once an online account is created you will select the reason for requesting a transcript as "Higher Education/Financial Aid", select a **"RETURN TRANSCRIPT"** and the year requesting as **2013**.
6. Save the PDF and/or print a copy. Always make sure to save copies for your own records.

If you select "Get Transcript by Mail", follow these steps:

1. Enter the tax filer's Social Security number, date of birth, street address and zip code. Enter address information exactly as it appears on your tax return. Click continue
2. In the type of transcript field select **"RETURN TRANSCRIPT"** and in the tax year field select **2013**.
3. If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript within 5 to 10 days of the request.

Upon receipt of the Tax Transcript, clearly print the student name and Stonehill ID number on the top and return to Student Financial Services, Stonehill College, 320 Washington Street, Easton, MA 02357