

Tax Transcript Request Instructions, 2023-2024

Tax filers can request a transcript of their **2021** tax return, free of charge, from the IRS by one of the methods listed below. Note: If you are eligible, you may still choose to import your tax data into the FAFSA directly from the IRS. This is the fastest and preferred option.

Data Retrieval Tool – Available at studentaid.gov

In order to use the data retrieval tool within the FAFSA, your taxes must be filed with the IRS.

In the parent tax information section, you will need to enter the parent's FSA ID and password and then click "Link to IRS" (see picture at right).

This will take you out of the FAFSA into the IRS database. Here you will enter your address as it is printed on your tax return.

If your information matches and is available you will see a second screen confirming that your tax information was located and ready to import. At the bottom of the screen do both

of the following: **Check the box** to transfer your tax information and **click the transfer now button** (see screenshot below). You will then be directed back to the FAFSA to finish entering information. Do this again in the student tax information section if the student also filed taxes.

Refer to your tax records if you have a question about the values you reported.

Transfer My Tax information into the FAFSA Form ?

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.



Do Not Transfer My Tax information and Return to the FAFSA Form ?

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end, and you will return to your FAFSA form.



If you are unable to use the Data Retrieval Tool in the FAFSA, then request a "Tax Return Transcript" from the IRS:

Online Tax Transcript Request - Available at <http://www.irs.gov/individuals/get-transcript>

The IRS system for ordering a transcript allows a person to get a transcript mailed to them if the tax return for the chosen year has been processed (see details on website).

- Go to <http://www.irs.gov>, and click on the blue box "Get Your Tax Record". You can then choose to get your transcript online or get it by mail. Note: If you request to get it online, you will need to create an account on the IRS website.
- You will need to provide the social security number, date of birth, street address (listed exactly as it is on your tax return) and ZIP code of the "Primary Taxpayer" when filing a joint return (the person listed first on the tax return). Click "Continue".
- Select Type of Transcript – "Return Transcript" (**Note: this is not the same document as your tax return.**)
- Select the Tax Year that you are requesting the transcript for. **For the 2023-24 school year, select tax year = 2021.**
- Click "Continue".
- If a transcript is not available and you have filed your taxes electronically more than 10 days prior to requesting and you do not owe any taxes, check the address that was entered. It is possible that your return was not processed yet; check back later.
- Note: If you have moved since filing your taxes, the tax transcript will be mailed to the address listed on the return.

Telephone Request - Available from the IRS by calling **1-800-908-9946**.

- You may be able to request that the transcript be faxed rather than mailed. Our fax number is 920-748-8370.
- Submit the tax return transcript to Ripon College, Office of Financial Aid; make sure to include the student's name and SSN number or student ID on the transcript.

Please email financialaid@ripon.edu or call Ripon College Office of Financial Aid at 920-748-8101 if you have further questions.