

As a part of your Verification process, STI must verify to the federal government that the 2018 tax information you provided on your 2020-2021 FAFSA is accurate. When originally completing the 2020-2021 FAFSA you were given the option of using the Automated IRS Data Retrieval Tool but chose NOT to. As a result, **along with all other documents listed on your enclosed letter, you must either utilize the IRS Data Retrieval tool on the FAFSA OR provide verified tax information for 2018.**

How Do I Use The IRS Data Retrieval Tool On The FAFSA?

To utilize the IRS Data Retrieval Tool on the 2020-2021 FAFSA, follow these steps:

1. Student logs into FAFSA at www.fafsa.gov
2. Ensure you are on the 2020-2021 tab near the top of the page
3. Click on the "Make Corrections" link near the middle of the page
4. Click on the "Financial Information" tab near the top of the page
5. Answer the questions asked to determine eligibility. If eligible to use the tool, enter your FSA password (For a dependent student, the parent financial information will be requested first)
6. Click on the "Link to IRS" button
7. Click on "OK" to leave the FAFSA website and go to the IRS website
8. Click on "OK" after reading the notification about the IRS website
9. Enter your personal information as it appeared on your 2018 federal tax return
10. Click on the "Submit" button in the bottom, right part of the page
11. If your information successfully matched with IRS information, a list of information (actual numbers are NOT displayed) that can be transferred will be shown. To transfer this information directly to the FAFSA, put a check mark in the "Transfer My Tax Information into the FAFSA" box and click the "Transfer Now" button.
12. You will now be back on the FAFSA. All Data that was transferred from your IRS tax return will say **Transferred from the IRS**. This will be the case for about 2/3 of the questions in the Financial Information section.
13. You will still need to provide answers manually to about 1/3 of the questions in the Financial Information section. The Financial Aid Office may be required to request further documentation if you fail to answer the non-transferred questions manually.
14. When finished with the "Financial Information" section(s), be sure to sign the FAFSA with your FSA password (parent will also need to sign for dependent students), agree to the statement regarding accuracy of information and click the "Submit" button at the bottom of the page.

To use IRS Data Retrieval Tool, your 2018 Federal Tax Return must be filed and processed by the IRS. The Retrieval Option is typically available 10-14 days after an electronic filing or 6-8 weeks after a mailed filing.

If you are unable to make the Data Retrieval Tool work you may instead provide verified tax information. Options for providing verified tax information are on the opposite side of this sheet.

What is Acceptable as Verified Tax Information?

Option 1

Provide a copy of your 2018 Tax Return. Federal guidelines require that copies provided to the financial aid office must be signed by the tax filer. On joint returns, a signature from ONE of the tax filers is required.

Option 2

Provide a copy of your 2018 IRS Tax Return Transcript. This document can be obtained from the IRS using one of the options listed below.

How Do I Obtain an IRS Tax Return Transcript?

1. Go <https://www.irs.gov/individuals/get-transcript>
2. Try to **Get Transcript ONLINE**. If unable to do so, you can **Get Transcript by MAIL**.

Request Online

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

Get Transcript Online

Request by Mail

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

Get Transcript by Mail

If you successfully create an account on the IRS website using the Get Transcripts Online option, you will have access to many documents that you can print immediately. The most common document needed for financial aid verification purposes is the TAX RETURN TRANSCRIPT. Be sure to print the document for the correct tax year.

If you successfully request documents to be mailed, you will see a message stating that your request has been accepted and you will receive your tax return transcript via US mail within 5-10 business days. If unsuccessful you will be given further options for acquiring the required information.

Mail to:

Southeast Tech Financial Aid
2320 N Career Ave
Sioux Falls, SD 57107

Fax To: (include front & back of all pages)

605-367-8305

Scan and Email to:

financialaid@southeasttech.edu

Pictures of documents will not be accepted

Students or parents who mail these tax documents to STI are encouraged to keep a copy for your records.