Skip ahead to Section 2 IF:
- You have filed an extension
- You are married filing separately
- You or your parents have had a marital status change since January 1, 2015
- You have filed an Amended Return

Section 1: How to Use the IRS Data Retrieval Tool (Linking your FAFSA with the IRS)

1. Go to www.fafsa.ed.gov and click “Login”. Enter requested information (Name, SSN, and Date of Birth) and click “Next.”

2. Make sure the correct year’s FAFSA is selected on the tab at the top of the screen. Click on “Make FAFSA Corrections”

3. Enter the requested Student PIN and the password created when the FAFSA was originally filed.

4. Click on Financial Information. If you want to use the Data Retrieval tool for the STUDENT ONLY, press “NEXT” at the bottom of the page before continuing.

To use it for the PARENT or BOTH STUDENT AND PARENT, continue to step 5.
5. Answer the 5 questions listed. As long as you can select “No” to each question, you should be eligible to use the Data Retrieval Tool. If any of the provided situations apply, you are not eligible to use the Data Retrieval Tool. If you are ineligible to use the data retrieval tool, please proceed to Section 2 of these instructions: “I Am Not Eligible to Use the Data Retrieval Tool”

6. Once all “No” boxes are checked, a box will appear beneath the questions. Enter the requested PIN and click LINK TO IRS.

7. Click OK

8. Now on the IRS website, enter requested information exactly as it appears on your tax return:
   - Name
   - DOB
   - Filing Status
   - Address

9. Click Submit
   If the IRS is able to validate your identification, your IRS tax information will display.

10. Click Transfer Now

11. Click OK
   * You may now repeat steps 5-11 to use the Data Retrieval tool for the Student.

12. Click Sign & Submit, Enter PIN, Agree to Terms

13. Click Submit FAFSA. You’re done! Check your MyMTC email account on a regular basis for correspondence from the MTC financial aid office.

If you do not Sign & Submit, your changes will not be saved and MTC will not receive your Data Retrieval!
Section 2: I Am Not Eligible to Use the Data Retrieval Tool – How to obtain a Tax Return Transcript from the IRS.

Due to changes made in 2012 by the Department of Education, the MTC Student Financial Services Office is unable to use personal copies of your Tax Return for Verification.

- **The fastest way** to obtain your official IRS Tax Return Transcript is to print it from the IRS website. See detailed instructions below on how to access/print your IRS Tax Return Transcript.

1. Student/Parent must log on to [www.IRS.gov](http://www.IRS.gov), then click “Get Transcript of your Tax Records”

2. On the following screen you will click “Get Transcript Online”
3. Next, you will click “Create an Account”  
   Note: If you have previously visited this site, sign in and skip to step # 8.

4. Time to sign up! Fill in the information requested and click “Send Email Confirmation Code”. A confirmation email will be sent to the email address you provided.

5. Next, you will log on. Retrieve your confirmation code from the email address you provided (Please open email account using a new browser). Once retrieved, enter the confirmation code in the requested box on the IRS site.
6. The following step will ask that you complete the form through its entirety and click the “Continue” button.

   **Note:** If you click the checkbox at the end of the form you will continue to retrieve your tax return transcripts as a guest without having to create an account.

7. The next section will ask for you to confirm a few security questions regarding your credit history. If answered incorrectly, it will not let you proceed to the next section to retrieve your IRS Tax Return Transcript.

8. Lastly, you have reached the final stage. On this screen, select “Higher Education/Student Aid” from the list. A green box will appear indicating the “Return Transcripts” and the different years available to retrieve.
9. Final step! Once you select a year to retrieve from your IRS Tax Transcript, a new window will open with the document. After the document opens, you may proceed to save the file by clicking the save button indicated in this picture.

10. Print the document and submit it to the Student Financial Services Office with your other requested documents.

Other methods of obtaining your Tax Return Transcript:

- **Request online to receive by mail:** Takes 5-10 business days

3. Under step 3, click “Get Transcript by mail.”
4. Click Ok. Enter requested information exactly as it appears on your tax return and click Continue.
5. Select type of transcript. You will need to order the Tax Return Transcript. We are unable to use an Account Transcript for verification purposes.
6. Click Continue. You’re done! Your transcript will be mailed within 5-10 business days.

- **By Phone** – Call the IRS at 1-800-829-1040 or 1-800-908-9946 and request the Tax Return Transcript.

**IMPORTANT:**
If you have filed an Amended Return, you are required to submit your signed 1040X form. You will also need to submit your 2014 Tax Return Transcript to the Student Financial Services Office. You cannot use the online Data Retrieval Tool.

If you have filed an extension and have not yet filed taxes, we need your Form 4868 Request for an Extension and your 2014 W2s (if self-employed, you must provide a signed statement estimating Adjusted Gross Income (AGI) and income taxes paid for 2014). We can process your Verification using the estimated numbers BUT once your taxes have been filed, we still need copies of your Tax Return Transcript(s). Your awards may change to reflect the actual numbers on the transcript.