

## IRS Instructions: 2023-2024

**The following includes instruction for (1) using the IRS Data Retrieval Tool on the FAFSA, (2) obtaining an IRS Tax Return Transcript, and (3) obtaining an IRS Verification of Non-Filing Letter.**

HCC strongly recommends that students and/or parent(s) use the IRS Data Retrieval Tool on the FAFSA. This process brings information on to your FAFSA directly from the IRS. There may be some cases in which the student and/or parent(s) is not eligible for, or chooses not to use, the IRS Data Retrieval tool. In those cases we are required to collect an IRS Tax Return Transcript to satisfy the outstanding tax documentation requirement(s). If you did not file taxes then you must provide us with an IRS Verification of Non-Filing Letter.

### **IRS Data Retrieval Tool:**

1. Go to <https://fafsa.gov>.
2. Log in to your FAFSA record.
3. Select the appropriate award year.
4. Select “Make FAFSA Corrections.”
5. Navigate to the Financial Information section.
6. Follow the on-screen instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into your FAFSA.

It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how, to use the IRS Data Retrieval Tool see your financial aid administrator.

IRS Data cannot be transferred electronically to the FAFSA if the return filing status was “married filing separately.”

**If any information transferred is altered after the IRS Data Retrieval is used then we will likely need to obtain copies of your 2021 IRS Tax Return Transcript(s).**

---

**To request your IRS Tax Return Transcript or Verification of Non-Filing Letter, please select one of the following options:**

### **Mail:**

1. Go to [www.IRS.gov](http://www.IRS.gov) and click on the “Get Your Tax Record” link, then select either “Get Transcript Online” or “Get Transcript by Mail.”
2. Gather your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the IRS tax return was filed).
3. **Follow the on screen instructions.**

Please allow 5-10 days to receive the transcript by mail.

### **Phone:**

Please call the IRS at 1-800-908-9946 and follow the prompts.

Updated March 9, 2023

**Online:**

The Get Transcript Online tool on [www.irs.gov](http://www.irs.gov) uses a new enhanced two-step, multi-factor authentication process that requires the user to register before submitting a transcript or verification of non-filing request.

To register and use this service, you will need to:

1. Collect your social security number, date of birth, filing status and mailing address.
2. Obtain access to your email account.
3. Obtain your credit card number or your account number from an auto loan, mortgage, home equity loan, **or** home equity line of credit.
4. Possess a text-enabled mobile phone with your name on the account.
5. Go to [www.IRS.gov](http://www.IRS.gov) and click on the “Get a tax transcript” link.
6. Click on “Get Transcript Online” and follow the on screen instructions.

During this process, the IRS will send the user a confirmation code via email and an authentication code via text. The IRS email and text will contain a one-time code that the user will use to finalize the Get Transcript Online registration. Note that the IRS will never request log-in information or personal data via email or text.

Please note that this method will not result in any charges to the card or to the financial account.

If you need assistance with requesting a Tax Return Transcript or Verification of Non-Filing Letter please contact the IRS.

Please keep a copy of your Tax Return Transcript or Verification of Non-Filing Letter for your personal records.

Please visit [www.hcc.edu/finaid/deadlines](http://www.hcc.edu/finaid/deadlines) for information regarding processing and verification deadlines.