Instructions for IRS Data Retrieval OR Tax Return Transcript

If selected for verification, federal regulations require transferring your income tax information by using the IRS Data Retrieval Tool available on the FAFSA website or by submitting Tax Return Transcripts to Berklee College of Music. Filing your tax returns early and electronically is recommended. Please note Berklee College of Music 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 students should monitor their Netpartner account and returning students should monitor their Berklee email account frequently to view the status of requested documents.

If any of the following statements are applicable, you are NOT ELIGIBLE to use the IRS Data Retrieval Tool; therefore, you must submit a Tax Return Transcript to Berklee College of Music.

- My tax filing status is Married Filing Separately
- My filing status is Head of Household
- 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. Please note that when using data retrieval for a joint tax return, make sure to use the first name that is listed on the tax return to search for the data.

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 continue and submit the FAFSA after completing this process.**

How to Request a Tax Transcript Online

2. Click “Get Transcript Online” OR Click “Get Transcript by Mail”
3. Read and agree to the IRS terms
4. Follow prompts

If you select to get your transcript online you must create an account (this will prompt you to obtain a Confirmation Code from the email address you provide; this code is only valid for 30 minutes).

If you select to get your transcript by mail and have successfully validated your information, you may expect to receive the IRS Tax Return Transcript within 5 to 10 days from the time the online request was successfully transmitted to the IRS.

**Upon receipt of the Tax Transcript, clearly print the student name and Berklee ID number on the top and return to the Office of Financial Aid, Berklee College of Music.**