

IRS Data Retrieval Tool and Tax Return Transcript Request Instructions

The vast majority of students and parents can use the IRS Data Retrieval Tool (IRS DRT) to update the FAFSA and document their tax return. However, if you (or the parent, if dependent) meet any of the criteria below, you cannot use the IRS DRT.

- The tax return was amended
- The person filed a Puerto Rican or foreign tax return
- The person is married but filed the tax return as either head of household or married filing separately.
- Students or parents who filed a joint return but are now divorced, separated, or widowed when the application is signed.
- The marriage date of the taxpayer is January 2015 or later.
- The first three digits of the SSN are 666.
- Neither married parent entered a valid SSN on the FAFSA.
- A non-married parent or both married parents entered all zeroes for their SSN.

**The IRS needs time to process your return before the data they collect can be made available. Please allow 2 to 3 weeks after you filed your taxes electronically (or 6 to 8 weeks if you filed by mail) before using the IRS DRT.

FAFSA IRS Data Retrieval Tool (IRS DRT) Instructions

1. Go to www.fafsa.ed.gov and click "Login". Enter your FSA ID and password and then click "Next".
2. Your current application status after login should say "Current Application Status: Processed Successfully". Chose the appropriate academic year and then select "Make FAFSA Corrections" toward the bottom of the page.
3. Create a Save Key (i.e. a password so that you can return to your data if you have to leave before submitting).
4. Select the 'Financial Information' tab. Parent information is displayed first (if student is dependent). To get to Student financial info, click "Next" at the bottom of the page to advance screens.
5. Select 'Already Completed' (if not selected already) from the drop-down box for the question "For 20XX, have your parents (or You (the student)) completed their (your) IRS income tax return or another tax return?"
6. Accurately answer the tax filing status question (check the 1040 form of the tax filer).
7. Answer the filter questions that appear under the heading, "To determine if you can use the IRS Data Retrieval Tool..."
8. If you (or parent) can answer "No" to the filter questions, the 'Link To IRS' button will display. For parents, the parent will then need to select which parent they are and then enter his/her FSA ID User Name and Password before accessing the 'Link To IRS' button.
9. Select the 'LINK To IRS' button to access the IRS DRT. You will then be directed to the IRS website. Click "OK" to leave FAFSA on the Web and, again, click "OK" for consent to enter the IRS system.
10. On the IRS website, enter the requested information (noted by a red asterisk *) exactly as it appears on the tax filer's tax return. You should refer to the tax return that was submitted to the IRS so as to answer the questions accordingly and then click "Submit".
11. The IRS will then present you with the data they will provide to your FAFSA. Click the box to "Transfer My Tax Information into the FAFSA" and then click "Transfer Now".

12. You are directed back to your FAFSA. You should see the message, "You have successfully transferred your 20XX IRS tax information." You will also see "**Transferred from the IRS**" above each question that was answered by the IRS DRT. Don't make any changes to those answers (except to remove untaxed IRA or pension rollovers (code G on the 1099-R form) that appear in the answer to "Untaxed portions of IRA or pension distributions" questions)!
13. Repeat steps 5-12 to use the IRS DRT for the student (or for parent).
14. Click "Sign & Submit" tab to sign for the corrections. (It is recommended that you first review all sections of the FAFSA for accuracy before signing, especially the financial questions that were not answered by the IRS DRT. You may use the 'Next' and 'Previous' arrows at the bottom of the screen to scan through the pages of the FAFSA.) Be aware that parent FSA ID and agreement to terms are needed in addition to the student's if you are a dependent.
15. Click "Submit my FAFSA Now" to complete the updates. A confirmation page will appear. **Please note:** You are not finished submitting corrections until you have received a confirmation number on the confirmation page.

Please call FAFSA at 1-800-433-3243 if you have any questions.

*****If you cannot use the IRS DRT** and you are required to document tax returns for verification, you must submit a 2015 IRS Tax **Return** Transcript (not the Tax Account Transcript!). Instructions follow.

IRS Tax Return Transcript Instructions

Tax filers can request an Internal Revenue Service (IRS) Tax Return Transcript of their 2015 IRS tax return from the IRS, **free of charge**, in one of five ways.

Online Request

- Go to the IRS Web site at www.irs.gov.
- In the Tools section of the homepage, click "Get a Tax Transcript."
- Click "Get Transcript by Mail"
- Click "OK" to close the pop-up window stating "THIS US GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!"
- Enter the tax filer's Social Security number, date of birth, street address, and ZIP Code or postal code. Use the address currently on file with the IRS. Generally, the street address and ZIP Code will be what was included on the latest tax return filed with the IRS by the tax filer. However, if an address change has been completed either directly with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file, which must be used. For a joint tax return, use the primary tax filer's information.
- Click "Continue."
- In the Type of Transcript field, select "**Return** Transcript" and, in the Tax Year field, select "2015."
- Click "Continue."
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 business days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be mailed to an address other than the address on file with the IRS.

***** Note – If the online process does not work or you want to submit a paper request to receive your Tax Return Transcript by mail you can submit the 4506-T or 4506T-EZ to the IRS.**

Telephone Request

- Call the IRS at 1-800-908-9946.
- Tax filers must follow prompts to enter their Social Security number and the numbers in their street address. Generally, this will be numbers of the street address that was included on the latest tax return filed with the IRS by the tax filer. However, if an address change has been completed either directly with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file, which must be used. For a joint tax return, use the primary tax filer's information.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter "2015."
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their phone request within 5 to 10 business days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be mailed to an address other than the address on file with the IRS.

Paper Request Form – IRS Form 4506T-EZ (used for requesting individual tax return transcripts only)

- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address on file with the IRS. It is the address where the IRS Tax Return Transcript will be sent. Include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed either directly with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file, which must be used. For a joint tax return, use the primary tax filer's information.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. We do NOT recommend sending the transcript to the college. Doing this will delay or prevent processing as we need student name and ID# to be on the form.
- On line 6, enter "2015" to receive tax information for the 2015 tax year that is required for the 2016-2017 FAFSA.
- The tax filers must sign and date the form and enter their telephone number. Transcripts of jointly filed tax returns may be requested by either spouse. Only one signature is required. Sign the IRS Form 4506T-EZ exactly as your name appeared on the original tax return. If you changed your name prior to submitting your tax return, also sign your current name.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of IRS Form 4506T-EZ.
- Tax filers can expect to receive their IRS Tax Return Transcript within 10 business days from the time the IRS receives and processes their signed request. NOTE: Processing IRS Form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

Paper Request Form – IRS Form 4506-T (used to request other types of transcripts besides the tax return transcript (e.g. non-tax filing, 1099 forms, wage transcripts, and form 5498)

- Download at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address on file with the IRS. It is the address where the IRS Tax Return Transcript or IRS Record of Account Transcript will be sent. Include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed either directly with the IRS or with the U.S. Postal Service, the IRS may have the updated address on file, which must be used. For a joint tax return, use the primary tax filer's information.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript or other transcript mailed directly to a third party by the IRS. We do NOT recommend sending the transcript to the college. Doing this will delay or prevent processing as we need student name and ID# to be on the form.
- On line 6, enter the tax form number that is being requested (1040, 1040A, 1040EZ, etc.) and check the appropriate box for the transcript being requested. Only one tax form number can be used per request.
- On line 9, enter "12/31/2015" to receive IRS tax information for the 2015 tax year that is required for the 2016-2017 FAFSA.
- The tax filers must sign and date the form and enter their telephone number. Transcripts of jointly filed tax returns may be requested by either spouse. Only one signature is required. Sign the IRS Form 4506T exactly as your name appeared on the original tax return. If you changed your name after submitting your tax return, also sign your current name.
- Mail or fax the completed IRS Form 4506-T to the appropriate address (or FAX number) provided on page 2 of IRS Form 4506-T.
- Tax filers can expect to receive their IRS Tax Return Transcript within 10 business days or their IRS Record of Account Transcript within 30 calendar days from the time the IRS receives and processes the completed and signed 4506-T request. NOTE: Processing IRS Form 4506-T means verifying/validating the information provided on the form. If any information does not match IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

IRS2Go App

The IRS has apps available to taxpayers. Visit the IRS website to see a list of apps that you can download.

- <https://www.irs.gov/uac/IRS2GoApp>