

## How to Use the IRS Data Retrieval Tool

Verification is a process where the Department of Education requires schools to collect the student and parent/spouse's official federal tax information. All tax information must come directly from the Internal Revenue Service (IRS). **The best way to do this is by using the IRS Data Retrieval Tool in the FAFSA application.**

\*You are not eligible to use the Data Retrieval Tool if you:

- are a victim of Identity theft
- were granted a filing extension
- filed an amended tax Return
- had a marital status change
- a married person who filed head of household

- If eligible to use the DRT you can make a correction and use the DRT to updated your FAFSA. Go to [fafsa.ed.gov](https://fafsa.ed.gov), select the *Login* button, and enter your FSA ID
- Select the *Make FAFSA Correction* button, enter a Save Key, and select NEXT
- Select the *Financial Information* tab from the top of the page.
  - a. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
  - b. If eligible click *Link to IRS*
  - c. Parents will need to enter their FSA ID to complete this process for their tax information



Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

[LINK TO IRS](#)



- d. Enter the address information EXACTLY how it was submitted on your taxes.
- e. Select the option that says Transfer Now located at the bottom of the page
- f. The tax information you transfer from the IRS into your FAFSA form won't be visible to you. You will see "Transferred from the IRS" in the appropriate fields on the FAFSA and other documents.

**DO NOT make any changes to information transferred.** Altering the information will cause the transfer to be invalid and will require us to request a hard copy of your tax transcripts from the IRS. If you are unable to use this option, additional options for obtaining IRS Transcripts are listed on the second page of this document.

# How to Request Tax Information from the IRS

**\*\*Parents and Independent Students who did not file taxes will need to request a **Wage and Income Transcript** and **Verification of Non-filing Letter** in order to complete verification.\*\***

**Requesting a Tax Return Transcript, Verification of Non-filing Letter or Wage and Income Transcript as a printable PDF:** (see 3 for items needed to create an account w/the IRS)

Visit [www.irs.gov](http://www.irs.gov) Select *Get Your Tax Record*

1. Choose *Get Transcript Online*
2. Select *Create Account* unless you're a returning user to the IRS website
3. You will need the following information to create a login
  - Email
  - Social Security Number (SSN) or Individual Tax Identification number (ITIN)
  - Tax Filing Status and mailing address
  - One financial account linked to you (credit card, (no debit or American Express), student loans, auto loan, home loan, etc.
  - Mobile phone linked to your name (for faster registration)
4. Enter the security code when prompted
5. Select Higher *Education/Student Aid* for the reason you need a transcript
6. Select *2019 Return Transcript, Verification of Non-filing or Wage and Income Transcript*
7. You should then be able to print a PDF version of you record or save it to your computer

## **Requesting a Tax Return Transcript to be Mailed:**

Visit [www.irs.gov](http://www.irs.gov) Select *Get Your Tax Record* (cannot get Verification of Non-filing letter or Wage and Income Transcript via this method)

1. Choose *Get Transcript by Mail*, click OK and enter requested information. Remember the address you enter should be the address your 2019 taxes were filed under, then click continue
2. Select *Return Transcript* and *2019* and click *Continue*.
3. You will receive a copy within 5-10 calendar days.

## **Requesting a Tax Return Transcript by Phone:**

1. Call the IRS at 1-800-908-9946.
2. Follow prompts for the language of choice
3. Enter your SSN and confirm, to verify address enter numeric portion of your address when prompted, this needs to be the address used when filing 2019 taxes
4. When prompted regarding which transcripts you want enter 2, do not choose number 1 as that will not be sufficient for our purposes
5. Enter 2019 when prompted regarding tax year
6. Do not enter anything when prompted to enter customer file number
7. You will receive a copy within 5-10 calendar days.

Verification of Non-Filing Letter, Wage and Income Transcript or Tax Return Transcripts can also be received by mail using IRS form 4506-T which can be printed from the IRS website and mailed. Go to [www.IRS.gov](http://www.IRS.gov) and click on Forms & Instructions then select Form 4506-T. Complete the form and mail to appropriate address.

**Please be aware that the IRS does not allow pick up transcripts from the IRS Office without an appointment.**