

INSTRUCTIONS FOR OBTAINING YOUR IRS TAX RETURN INFORMATION

FAFSA IRS Data Retrieval Tool

Recommended

The most efficient and quickest way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your FAFSA application.

In most cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

- * Go to www.fafsa.ed.gov and select Login
- * Log in using your FSA ID and password
- * Select "Make FAFSA Corrections"
- * Create a save key
- * Click on the Financial Information tab and follow the directions provided. Be sure to enter your address exactly as it appears on your Federal 1040 tax form.
- * Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.



IMPORTANT: If you use the Data Retrieval Tool to link your tax information, please do NOT submit paper copies of your IRS Tax Return Transcript, unless requested by your Financial Aid Office.

*If you are unable to use the Data Retrieval Tool, or you choose not to, you must submit a copy of all required IRS Tax Return Transcript(s).

NOTE: This is NOT your Federal 1040, 1040A or 1040EZ. Please do not submit these, unless requested by your Financial Aid Office.

Requesting Your IRS Tax Return Transcript

Online Request:

- * Go to www.irs.gov
- * Under the Tools list, Click on "Get a tax transcript"
- * Select "Get Transcript by MAIL"
- * Follow the prompts, making sure to request the "IRS Tax Return Transcript", and **NOT** the "IRS Tax Account Transcript."

Telephone Request: Call 1-800-908-9946 and follow the prompts

Paper Request Form: Complete and Submit IRS Form 4506T-EZ or IRS Form 4506-T

NOTE: Tax Return Transcripts take a minimum of 5-10 business days to receive. They will be mailed to your address on record with the IRS.

Tax Filers with Special Circumstances

Individuals Granted a Filing Extension by the IRS – Provide the following documents:

- * a copy of the tax filer's IRS Form 4868 that was filed with the IRS for the tax year;
- * a copy of the IRS's approval of an extension beyond the automatic six-month extension (if applicable);
- * a copy of the W-2 forms for each source of employment income received for the tax year and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the US income tax paid for the tax year.

Individuals Who Filed an Amended IRS Income Tax Return – Provide a copy of the original IRS tax return that was filed with the IRS, a transcript obtained from the IRS that lists tax account information of the filer for the tax year and a signed copy of the IRS Form 1040X that was filed with the IRS.

Individuals Who Were Victims of Tax Administration Identity Theft – Call the IRS at 1-800-908-4490 to request a Tax Return Data Base View (TRDBV) transcript. You must also provide a signed statement indicating you were a victim of tax-related identity theft.

Individuals Who Filed Non-US Income Tax Returns – A transcript obtained, at no cost, from a government of a US territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for the tax year. If the transcript cannot be obtained at no cost, a signed copy of the applicable tax return(s).