

Providing IRS Tax Return Information

If your Free Application for Federal Student Aid (FAFSA) has been selected for review in a process called **verification**, you must verify the income and tax information reported on the FAFSA. If you and/or your spouse or parent (if applicable) filed a tax return for the year referenced in the FAFSA, you must provide your tax information using one of the following methods.

Preferred Method

Use the IRS Data Retrieval Tool (IRS DRT) in the FAFSA

(quickest method available)

The IRS Data Retrieval Tool (IRS DRT) electronically transfers the required federal tax return information directly into your FAFSA.

Why use the IRS DRT?

- **EASY:** Transfer info with the click of a button.
- **FAST:** Instantly retrieve your information.
- **ACCURATE:** Correctly fill in your information.

Most students and parents who filed a U.S tax return are eligible to use the IRS DRT. However, there are a few scenarios in which students and parents are ineligible to use the IRS DRT, such as:

- The student/parent is married and filed as *Married Filing Separately* or *Head of Household*.
- The student/parent filed a Puerto Rican or foreign tax return, or an IRS Form 1040-NR or 1040NR-EZ .
- The parents' marital status on the FAFSA is "Unmarried and both legal parents living together".
- The student/parent filed taxes electronically within the last 3 weeks or by mail within the last 11 weeks.
- The student/parent had a change in marital status after the end of the tax year (Dec 31) and before filing the FAFSA.

To complete the FAFSA verification process, students and parents who are ineligible or otherwise choose not to use the IRS DRT will need to enter tax return information manually into the FAFSA and provide documentation of the tax return information filed with the IRS to Student Financial Services (see Alternative Methods on page two).

How to use the IRS DRT

Students and parents who are eligible to use the IRS DRT can access it within the online FAFSA by following these instructions:

- **Log in** to your current FAFSA, or start a new FAFSA at fafsa.gov.
- Once you have answered a series of questions pertaining to your federal income tax return, *if eligible*, you will be presented with the option to transfer your tax return information into the FAFSA using the IRS DRT.
- In the **Finances** section of the online form, you will answer a series of questions pertaining to your federal income tax return, and if eligible to use the IRS DRT, you will then be presented with the **Link to IRS** button.
- Select **Link to IRS** and enter your **FSA ID*** to be transferred to the IRS site to retrieve your tax return information.
 - * The person whose tax information is being transferred should enter his or her own FSA ID; students will not be asked to reenter their FSA ID if they entered the FSA ID to begin their FAFSA.
- Once at the IRS site, enter your information *exactly* as it appears on your federal income tax return and click **Submit**.
- Once authenticated with the IRS, check the **Transfer My Tax Information into the FAFSA** box and select **Transfer Now**.
- You will know that your federal tax return information has been successfully transferred because the words **Transferred from the IRS** will display in place of the IRS information in your FAFSA form.

Amended Tax Return Filers: Students and parents who filed an *amended* tax return (IRS Form 1040X) must also **submit a signed copy of Form 1040X filed with the IRS** to Student Financial Services to verify the correct information to be reported on the FAFSA.



Alternative Methods

Submit Copies of IRS Tax Return Documents

(if unable to use IRS DRT)

Students and parents who are ineligible or otherwise choose not to use the IRS DRT will need to enter their tax return information manually into the FAFSA and provide documentation of the data filed with the IRS to complete the verification process.

Alternative Method 1 – Order a **Tax Return Transcript** from the IRS for the tax year referenced in the FAFSA:

- Get Transcript Online – Instant access to download/print once registered and authenticated with the IRS.
- Get Transcript by Mail – Most mail delivery requests are processed within approximately 5 to 10 business days.

Alternative Method 2 – Submit a **signed copy of the Tax Return (Form 1040) and applicable Schedules** filed with the IRS for the tax year referenced in the FAFSA.

Alternative Method 1

Order IRS Tax Return Transcript

Get Transcript Online: (order transcript for the **tax year referenced in the FAFSA**)

- **Order Online** – Go to www.irs.gov and select **Get Your Tax Record**. Once you have reviewed and gathered the information needed to register and use the online transcript ordering service, select **Get Transcript Online**. Enter the required data and proceed to request a **Tax Return Transcript**. Upon successful completion of the IRS's rigorous identity authentication process, proceed to order, download and print a free copy of your **Tax Return Transcript**.

Get Transcript by Mail: (order transcript for the **tax year referenced in the FAFSA**)

- **Order by Phone** – Call the automated line at **1.800.908.9946** and follow the prompts to request a **Tax Return Transcript**. Once validated, the transcript will be mailed to the address on file with the IRS within 5-10 calendar days. *(If a joint tax return was filed, only the primary taxpayer on the joint return may use this tool.)*
- **Order Online** – Go to www.irs.gov and select **Get Your Tax Record**. Once you have reviewed and gathered the information needed to use the request by mail service, select **Get Transcript by Mail**. Enter the required data and proceed to request a **Tax Return Transcript**. Once validated, the transcript will be mailed to the address on file with the IRS in 5-10 days. *(If a joint tax return was filed, only the primary taxpayer on the joint return may use this tool.)*
- **IRS Form 4506T-EZ** – Go to www.irs.gov and select **Search Forms & Instructions**. In the box located under **Forms, Instructions, and Publications Search**, type **4506T-EZ** to easily locate the form. From the search results, open **Form 4506T-EZ** (Short Form Request for Individual Tax Return Transcript). Complete lines 1a – 5 as indicated. In line 6, enter the appropriate year(s) of the return transcript you are requesting. Sign/date and submit Form 4506T-EZ to the IRS at the address or fax # provided in the instructions on page 2 of the form. Once received by the IRS, the transcript will be mailed to the tax payer's address on file with the IRS within approximately 10 business days.

Amended Tax Return Filers: Students and parents who filed an *amended* tax return (IRS Form 1040X) for the tax year referenced in the FAFSA must also **submit a signed copy of Form 1040X filed with the IRS** to verify the correct data to report on the FAFSA.

Alternative Method 2

Submit Signed Copy of IRS Tax Return and Schedules

Submit a **signed copy** of the **Tax Return (Form 1040) and applicable Schedules filed with the IRS** for the tax year referenced in the FAFSA. If a tax filer did not retain a copy of their tax return filed with the IRS, they may be able to obtain a copy of from the tax professional or software product used to prepare and file their return (if applicable).

Amended Tax Return Filers: Students and parents who filed an *amended* tax return (IRS Form 1040X) for the tax year referenced in the FAFSA must also **submit a signed copy of Form 1040X filed with the IRS** to verify the correct data to report on the FAFSA.