

Schools are no longer permitted to accept copies of federal income tax returns in order to satisfy tax verification requirements. Therefore, you must submit your income tax information one of two ways - either by using the Internal Revenue Service Data Retrieval Tool (IRS DRT) to transfer income tax information directly from the IRS web site into the FAFSA or by submitting a copy of a tax return transcript. Directions on utilizing both options are detailed below.

### **IRS Data Retrieval:**

Using the IRS DRT when you **initially** file the FAFSA...

- Log into [www.fafsa.gov](http://www.fafsa.gov) and begin the application. Once to the "Financial Information" section, you will be asked if you have or have not filed your taxes. **If you have already filed your taxes (at least 10 days prior)**, you may have the option to use the IRS DRT.  
**NOTE:** Parental information requires separate IRS access and can only be done by the parent. If you have not yet filed your taxes and select the "will file taxes" option, you cannot use the IRS Data Retrieval at this time.
- Click **Link to IRS** and you will be transferred to the IRS Web site.
- On the IRS Web site, enter the requested information and click submit. Be sure to enter your address exactly as shown on your taxes.
- Your IRS tax information will be displayed. Check the box near **"Transfer My Tax Information into the FAFSA"** and then click **"Transfer Now."**
- Questions that are populated with IRS tax information will be marked with **"Transferred from the IRS."**  
**NOTE:** If you change the data that is transferred, the retrieval process is voided.
- Be sure to finish the FAFSA and electronically sign (if a dependent student, one of the parents also needs to electronically sign) and submit your FAFSA. You are not finished until you have successfully submitted your FAFSA and received a confirmation number.
- If the data transfer is successful, the school(s) listed on the FAFSA will be notified within 3-5 business days.

Using the IRS DRT **after** the FAFSA has already been submitted...

- Log back into [www.fafsa.gov](http://www.fafsa.gov) at least 10 days after you have electronically filed taxes.
- Click on **"Make FAFSA Corrections"** located near the bottom of the page.
- Click on the **"Financial Information"** tab. **NOTE:** Students may update only their own tax information; parents must update their own tax data.
- Change from **"Will File"** taxes to **"Already Completed"** taxes.
- **If** you are eligible to use the IRS Data Retrieval Process, click the **"Link to IRS"** button that is shown.
- On the IRS Web site, enter the requested information and click submit. Be sure to enter your address exactly as shown on your taxes.
- Your IRS tax information will be displayed. Check the box near **"Transfer My Tax Information into the FAFSA"** and then click **"Transfer Now."**
- Questions that are populated with IRS tax information will be marked with **"Transferred from the IRS."**  
**NOTE:** If you change the data that is transferred, the retrieval process is voided.
- Be sure to finish the FAFSA and electronically sign (if a dependent student, one of the parents also needs to electronically sign) and submit your FAFSA. You are not finished until you have successfully submitted your FAFSA and received a confirmation number.
- If the data transfer is successful, the school(s) listed on the FAFSA will be notified within 3-5 business days.

### **IRS Tax Return Transcript:**

**\*NEW\*** Print a return transcript yourself...

- Go to [www.irs.gov](http://www.irs.gov) and click on **"Get Transcript of your Tax Records"** under the **"Tools"** section.
- Click **"Get Transcript Online"** where you will be prompted to create an account or sign in if you already have one.
- Once an account is created and you've signed in, select **"Higher Education/Student Aid"** as the reason to request the transcript.
- Select the appropriate year which will then show all the transcripts available for that year.
- Select the appropriate year under the **"Return Transcript"** section.
- Your tax return transcript should then be displayed. **NOTE:** Your browser may need to allow pop-ups in order for the file to open.
- Submit a copy to the school(s) via email, fax, mail or delivered in person.

Request a return transcript by mail...

- Go to [www.irs.gov](http://www.irs.gov) and click on **"Get Transcript of your Tax Records"** under the **"Tools"** section.
- Click **"Get Transcript by Mail"** and enter the tax filer's information.  
**NOTE:** Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed.
- Click "Continue."
- In the **Type of Transcript** field, select **Return Transcript (NOT an Account Transcript)** and in the **Tax Year** field, select **2013**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript mailed to their address within 5 to 10 days.
- Once the tax return transcript is received, submit a copy to the school(s) via email, fax, mail or delivered in person.

Request a return transcript by telephone...

- Contact the IRS by calling 1-800-908-9946.
- Tax filers must follow prompts to verify identity.
- Select **Option 2** to request an IRS Tax Return Transcript and then enter **2013**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at their address within 5 to 10 days.
- If you need further assistance, press "0" to speak to an IRS Representative.
- Once the tax return transcript is received, submit a copy to the school(s) via email, fax, mail or delivered in person.