

Instruction for Obtaining IRS Tax Return Transcript

FAFSA IRS Data Retrieval Tool

*** Recommended ***

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

- Go to www.fafsa.gov and select Login.
- Select “Make FAFSA Corrections”
- Select the Financial Information tab and follow the instructions provided. Be sure to enter your address exactly as it appears on your Federal 1040.
- 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 Tax Return Transcripts unless requested by the Financial Aid Office.

Don't Want to Use the Data Retrieval Tool?

If you are unable to use the Data Retrieval Tool, or choose not to, you must submit:

1. a paper copy of all required Tax Return Transcript(s) **and**
2. copies of W-2's or 1099 forms from ALL employers (student and parent). *Replacement copies of W-2's can be obtained from your employer or you may obtain a Wage and Income Transcript from the IRS (www.IRS.gov).*

Options for Getting Your Tax Return Transcript

Online Request

- Go to www.IRS.gov
- Select “Get My Tax Record.”
- Select “Get Transcript ONLINE” or “Get Transcript by MAIL.”
- Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript”.

Telephone Request – 1-800-908-9946

Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

Tax Filers with Special circumstances

Individuals granted a filing extension by the IRS beyond the automatic six-month extension – Provide the following:

- a copy of 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 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 U.S. income tax paid for the tax year; **and**
- Documentation from the IRS dated on or after October 1, 2017 that indicates a 2016 income tax return was not filed (Form 1c).

Individuals who Filed an Amended IRS Income Tax Return – Provide a copy of the IRS tax return transcript **and** a signed copy of the IRS Form 1040X.

Individuals Who Were Victims of Tax Administration Identity Theft – Call the IRS at 1-800-908-4490 and complete Financial Aid Form 1e.

Individuals Who Filed Non-US Income Tax Returns – Provide a signed copy of that income tax return(s); **or** a transcript obtained from a government of a U.S. 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.