

Using the IRS Data Retrieval Tool

Accessing the Data Retrieval Tool (DRT) through the FAFSA

NOTE: You will not be able to use the DRT if you filed an Amended Tax Return (1040X), if you filed a foreign or Puerto Rican tax return, if you filed Married, Filing Separately, or if the IRS has not yet processed your tax return (this will take about 2 weeks, if you filed electronically).

1. Go to www.fafsa.gov and then to the **Financial Information** section of the FAFSA. If you have already submitted your FAFSA, you will need to click on **Make corrections to your FAFSA** and then go to the **Financial Information** section.
2. If you are a student, you will see a section labeled **Student Tax Information**. If you are a parent, you will see a section labeled **Parent Tax Information**. You will need to indicate on the first question under that heading that your taxes are "Already Completed".
3. You will then be asked what your tax filing status is (refer to your federal tax return for this information).
4. Once you have indicated your tax filing status, a box will appear requiring you to answer three questions about your tax filing status (the questions will only show up one at a time). If you can answer "No" to each of the questions, a link will pop up that says **Link to the IRS**.
5. When you click on the link, a pop-up appear warning you that you are leaving the FAFSA on the Web site, followed by a pop-up warning from www.irs.gov stating that the IRS webpage is for authorized use only. Click **OK** for both pop-ups.
6. On the IRS site, type your name, address, and marital status exactly how they appear on your federal tax return (IRS Form 1040EZ, 1040A, or 1040). Once you have typed this information in, click **Submit**.
7. You should see your tax information listed on the screen at this point. **NOTE:** *If you do not see your information, an error screen will appear indicating what may have gone wrong. If you are not able to transfer your tax information with the DRT, you will need to request a tax return transcript. See the other side of this document for directions.*
8. If your tax information did appear successfully, scroll to the bottom of the page and check the box that says **Transfer My Tax Information into the FAFSA**, and click the button on the right that says **Transfer Now**.
9. The IRS web page will then redirect you to your FAFSA, which will now have all of your tax information pulled in from the IRS. Under each applicable box, it will say **Transferred from the IRS**. Do not change any of this information. If you do change any of this information and submit the FAFSA, you will be required to request a transcript instead.
10. If you or your parents, if you are a dependent, are married, you will need to type in you and your spouse's income for the tax year. This information can be found on each of your W2s in the box labeled **Wages, Tips, other comp**.
11. Depending on you or your parents' financial situation, you may be asked some additional questions. Answer any blank questions and then submit your FAFSA.
12. Your updated FAFSA will take up to 3 business days to process and then reach the Financial Aid Office shortly thereafter. Please make sure to notify the FAO to be looking for your updated FAFSA.

IRS Tax Return Transcript

Note: The best method for verifying your tax information on the FAFSA is by using the IRS Data Retrieval Tool (DRT) on your FAFSA. Directions can be found on the other side of this document. If you cannot use the DRT, then you can request a tax return transcript free of charge from the IRS.

Online Request - Get Transcript by MAIL

- Go to www.irs.gov.
- Under the Tools heading on the IRS homepage click “Get Transcript of Your Tax Records”
- Click “Get Transcript by MAIL.”
- Acknowledge the disclosure pop up box that appears by clicking “OK.”
- Complete the required fields (SSN, DOB etc.) then click “Continue.”
- In the **Type of Transcript** field, select “Return Transcript” and, in the **Tax Year** field, select the appropriate year.
- Click “Continue.”
- If successful, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 business days from the time the online request was successfully transmitted to the IRS.

Note: IRS Tax Return Transcripts requested online cannot be mailed to an address other than the address on file with the IRS.

Telephone Request

- Call 1-800-908-9946.
- To continue in English press 1.
- Tax filers must follow prompts to enter their Social Security number and the numbers in their street address
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter the appropriate year.
- If successful, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their telephone request within 5 to 10 business days from the time the IRS receives the request.

Note: IRS Tax Return Transcripts requested online cannot be mailed to an address other than the address on file with the IRS.

In Person

- If you live in the Kentuckiana area, you can request a transcript in person **by appointment only** at the Federal Building in downtown Louisville. You will need to call 1-844-545-5640. The address is 600 Dr. Martin Luther King, Jr. Place, Louisville, KY 40202 and the hours are Monday through Friday 8:30 am to 4:30 pm. You will need a state issued photo ID and can only pick up your own transcript.
- If you do not live in the area, you can look up other IRS office locations by going to www.irs.gov. Please note that other offices may have other criteria for requesting a transcript in person.