

## Using the IRS Data Retrieval Tool

**NOTE:** *You will not be able to use the DRT if you filed an Amended Tax Return (1040X), a foreign or Puerto Rican tax return, Married, Filing Separately, or filed electronically within the last two weeks.*

1. Go to [www.fafsa.gov](http://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. Students will see a section labeled **Student Tax Information**. Parents will see a section labeled **Parent Tax Information**. Select "Already Completed" on the first question for your tax filing status.
3. Indicate on the next question your tax filing status based on your federal tax return.
4. After this, a question will appear asking if you filed a Puerto Rican or foreign tax return. If you can answer "No," a box will appear underneath the question that will say **Link to the IRS**.
5. Once you click on the link, a warning appears stating that you are leaving the FAFSA on the Web site, followed by another warning from the IRS stating that the IRS webpage is for authorized use only. Click **OK** for both.
6. On the IRS site, type your name, address, and marital status exactly how they appear on your federal tax return (1040EZ, 1040A, or 1040). Once you have typed in this information, click **Submit**.
7. If successful, a notice will appear on the next screen asking for your permission to transfer your tax information into the FAFSA. Your tax information will not appear on the FAFSA in order to protect your financial information.  
**NOTE:** *If the IRS does not provide you with the ability to use the DRT, you will need to request a tax return transcript. See the other side of this page entitled Requesting an IRS Tax Return Transcript for directions.*
8. Scroll to the bottom of the page and check the box that says **Transfer My Tax Information into the FAFSA**. Then, click the button on the right that says **Transfer Now**, in order to pull your tax information directly into your FAFSA.
9. Once you have transferred your tax information into the FAFSA, you will be taken back to the FAFSA, where you will have to indicate how much you and/or your spouse earned from working (wages, salaries, tips, etc.). This information can typically be found in Box 1 of each tax filer's W2, line 1 of the 1040EZ federal tax return, or line 7 of the 1040A and 1040 federal tax returns. If you filed Married, Filing Jointly, you will have to use each person's W2s to complete how much person earned in wages, as the tax returns combine the wages earned for the household.
10. After inputting your and/or your spouse's wages earned, the FAFSA will now have all of your tax information pulled in from the IRS. Under each applicable box it will say **Transferred from the IRS**. As stated above, you will not be able to see any of the details from your tax return on the FAFSA.
11. Scroll to the bottom of the **Student/Parent Tax Information** section and answer any questions referring to your current assets in cash, checking, and savings accounts.
12. Read and agree to the terms listed on the **Sign and Submit** section of the FAFSA, click the **Sign** button, and then click **Submit My FAFSA Now** at the bottom of the page.
13. Your updated FAFSA will take 3 business days to process. Please notify the Financial Aid Office that you have successfully used the IRS Data Retrieval Tool.

## Requesting an 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.

### **1. Online Request – Have Transcript Displayed Online**

If you do not have each of the following items, you will have to request a transcript be mailed to you using one of the options below:

1. SSN.
2. Date of Birth.
3. Tax Return Filing Status.
4. Mailing address of latest tax return.
5. Access to a credit card number (not a debit card) or your auto loan account number, mortgage, or home equity line of credit.
6. Mobile phone account (*Your name must be on the account. If you are on a family plan, but you are not listed as the account holder, you will not be able to use the online request feature.*)
7. Active email account.

- Go to [www.irs.gov](http://www.irs.gov).
- Under the Tools heading on the IRS homepage click “Get Transcript of Your Tax Records.”
- Click “Get Transcript Online.”
- Follow each of the following steps for setting up an account and providing the necessary information to have your return transcript displayed electronically.

### **2. Online Request - Get Transcript by MAIL**

- Go to [www.irs.gov](http://www.irs.gov).
- Under the **Tools** heading, click “Get Transcript of Your Tax Records”.
- Click “Get Transcript by MAIL.”
- Click “OK” on the pop up box.
- Complete the required fields, then click “Continue.”
- In the **Type of Transcript** field select “Return Transcript,” and in the **Tax Year** field select the appropriate year, then click “Continue.”
- If successful, you will receive your Tax Return Transcript by mail, within 5 to 10 business days.

**Note:** IRS Tax Return Transcripts requested online can only be mailed to the address on file with the IRS.

### **3. Telephone Request**

- Call 1-800-908-9946.
- Follow prompts regarding your Social Security number and your street address.
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter the appropriate year.
- If successful, you will receive your Tax Return Transcript by mail, within 5 to 10 business days.

**Note:** IRS Tax Return Transcripts requested online can only be mailed to the address on file with the IRS.

### **4. In Person**

- If you live in the Kentuckiana area, you could possibly 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 may be able to look up other IRS office locations by going to [www.irs.gov](http://www.irs.gov). Please note that other offices may not offer that option.