



IRS Data Retrieval Tool and Tax Return Transcripts Instructions

How to use the IRS Data Retrieval Tool in FAFSA

The best way to verify tax return information is by using the IRS Data Retrieval Tool which is part of the FAFSA on the Web application. If the student or parent(s) have not already used the tool,

- o Go to www.studentaid.gov
- o Login to the student's FAFSA using their [FSA ID \(https://fsaid.ed.gov/npas/index.htm\)](https://fsaid.ed.gov/npas/index.htm)
- o Select **Make FAFSA Corrections** and then enter a **Save Key**
- o Navigate to the **Financial Information** section of the application
- o Follow the on-screen instructions. Based on your answers FAFSA will determine if the student or parent(s) can use the IRS Data Retrieval Tool to transfer **2020** IRS income tax information into the FAFSA. If eligible to use the tool you will see a button that says **Link to IRS**
- o Click the **Link to IRS button** which will redirect you to the Internal Revenue Service web site. A message will display explaining you are 'leaving FAFSA on the web'. To continue with transferring your information, click **Proceed to IRS site Notice:** for parent's, you must enter the parent's FSA ID before clicking the **Link to IRS button**.
 - o Generally most, if not all, of the following fields' information is populated into the corresponding fields based on the answers reported on the FAFSA: *First Name, Last Name, Social Security Number, Date of Birth and filing status*. However, if this information is not pre-populated you will need to enter it.
 - o Enter your address (must match your 2020 Federal Income Tax Return), city, state and zip code. Click **Submit** in the bottom right corner of the page.
- o To transfer the data, click the box to place a checkmark under **Transfer My Tax Information into the FAFSA** section and then click the **Transfer Now** button.

Once you've transferred the data into FAFSA you will see **Transferred from the IRS** next to each question where the information was transferred.

Notice: do not click 'save' and exit the application as you still need to finish the rest of the application. At the end of the application you need to make sure you, and your parent (if applicable), sign your FAFSA using your FSA ID.

How to request your 2020 Tax Return Transcripts from the IRS

From the [IRS website](https://www.irs.gov), you can request a tax return transcript through their Get Transcript [Online](#) or Get Transcript by [Mail](#) options. You can also contact the IRS by phone to request your tax return transcript. **Note: the method you used to file your return and whether you have a refund or balance due, affects your current year transcript availability.**

Get Transcript Online	Get Transcript by Mail	Get Transcript by Phone
To use this service you need: <ul style="list-style-type: none"> • Full Name; • Email; • Date of birth; • Your Social Security Number or Individual Tax Identification Number (ITIN); • Tax Filing Status; • Current address; • Personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan and, • Mobile phone with your name on the account. Note: if account setup is successful you will be able to download and/or print your tax return transcript.	To use this service you need: <ul style="list-style-type: none"> • Your Social Security Number or Individual Tax Identification Number (ITIN); • Date of birth and, • Mailing address from your latest tax return Note: transcripts generally arrive in 5-10 calendar days to the address the IRS has on file for you. The IRS will never send an email requesting that you obtain or access your transcripts. If you receive such a notice, please forward to the IRS fraud group at phishing@irs.gov .	Call (800) 908-9946 and follow the telephone prompts.
Notice: Be sure to request an IRS Tax Return Transcript – not an IRS Tax Account Transcript.		