

## How to Provide Finalized Federal Income Tax Information

Finalized federal income tax information should be provided using the FAFSA IRS Data Retrieval Tool. Students and parents may transfer their data from the IRS directly into their FAFSA. Finalized tax information is available after your tax return has been received and processed by the IRS. **If you file electronically**, your information will be available about 3 weeks after filing. **If you file by mail**, your information will be available about 6 weeks after filing.

### Using the IRS Data Retrieval Tool (Preferred Method)

Complete for both parent and student, as applicable.

**When originally completing the FAFSA** at [www.fafsa.gov](http://www.fafsa.gov), follow the directions below when you get to the 'Financial Information' section.

**If you've already submitted your FAFSA**, but have not used the IRS Data Retrieval Tool, you should login to your FAFSA as a Returning User to transfer your final tax information if your 2019 tax return has been received **and processed** by the IRS. On the page "My FAFSA", click 'Make FAFSA Corrections' found below the 'Current Application Status' section. On the page 'Introduction Page – 2021-2022 Correction', click 'Next' at the bottom of the page. This will take you to the 'Student Demographic Information' page. In the tabs across the top of the page, choose 'Financial Information'.

1. On the 'Financial Information' tab, when asked about the status of the tax return, choose 'Already Completed'.
2. Choose the parents' tax filing status according to their tax return.
3. You will get the message: **'You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS'**. It will then ask you a series of questions (Did you, the parents, file an amended tax return? etc.) Based on your responses, you will receive one of the following messages:  
 'We recommend that you transfer your information from the IRS into this FAFSA.' You will click **Link to IRS** and will then be taken to the IRS website to complete this process.

**-OR-**

'If you are not eligible to transfer your information from the IRS into this FAFSA.' (See table below for instructions)

4. If you are eligible, select "**Link to IRS**". Your FAFSA will be saved and you will be transferred to the IRS website.
5. On the IRS website, enter the requested information.
6. Once the IRS has validated your identification, your IRS tax information will display. If the information is accurate, you can either transfer your information from the IRS, or choose to return to *FAFSA on the Web* from the IRS website. If you do not transfer your information or choose not to return from the IRS website, you will have to login to open your saved FAFSA.
7. If you transfer your IRS tax information, questions that are populated with verified tax information will be marked with "Transferred from the IRS."
8. Go back to FAFSA, enter your FSA ID(s) to sign, then submit.

You may get this message if you:	In this case, you should submit the following:
Filed an amended 2019 Federal Tax Return.	-An IRS Tax Return Transcript -A signed copy of the filed 1040X
Filed 'Married Filing Separately'.	-An IRS Tax Return Transcript for each parent
Filed 'Married Filing Joint' and are no longer Married to the person you filed with.	-An IRS Tax Return Transcript -A copy of W-2s for each source of employment income received
Will not file a 2019 Federal Tax Return.	-A Non-Filer Statement, attaching any W-2s received for employment income reported on the FAFSA and an IRS Verification of Non-Filing Letter (for the parent of an independent student or an independent student).
Filed a non U.S. Tax Return (including the U.S. territories of Guam, American Samoa, and the U.S. Virgin Islands), commonwealths (Puerto Rico and Northern Mariana Islands) and all other foreign tax returns.	- A copy of a transcript of tax information, if a transcript is available at no charge from that jurisdiction's taxing authority. A <b>signed</b> copy of the applicable 2019 income tax return <b>including Schedule 1, Schedule 2, and Schedule 3</b> that was filed with the taxing authority is only acceptable if you are unable to obtain a free copy of a transcript of tax information.

Are a victim of tax-related identity theft?	<p>-An IRS Tax Return DataBase View (TRDBV)*  -A statement signed &amp; dated by the tax filer indicating that the IRS has been made aware that they are a victim of tax-related identity theft.</p> <p><i>*Filers who believe they are victims of identity theft should call the Identity Protection Specialized Unit (IPSU) at 800-908-4490. After the IPSU authenticates the tax filer's identity, the tax filer can request a TRDBV.</i></p>
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## **IRS Tax Return Transcript Request Process**

Tax filers can request a transcript, free of charge, of their tax return from the IRS in one of three ways - online, by phone, or by mail. IRS Tax Return Transcripts requested online or by telephone cannot be mailed to an address other than the address on file with the IRS.

### **Online Request at [www.irs.gov](http://www.irs.gov).**

- In the **Tools** section of the homepage click "Get a Tax Transcript".
- Enter the primary tax filer's Social Security number (SSN) or Individual Tax Identification Number (ITIN), date of birth, and address from your latest tax return.
- In the **Type of Transcript** field, select "Return Transcript" and in the **Tax Year** field, select the year you wish to request (i.e., for the 2021-2022 FAFSA, the 2019 tax year is required).
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request in 5-10 days.
- Once you receive the Tax Return Transcript from the IRS, please include your student's full name and student ID before sending it to our office. It can be sent to our office via fax, email, or mail. If you are mailing it to our office, please keep a copy of the Tax Return Transcript for your records as the IRS will only provide one transcript free of charge per year.

### **Telephone Request at 1-800-908-9946**

- Follow prompts to enter the primary tax filer's social security number and the numbers in their street address. Use the address from your latest tax return.
- Select "**Option 2**" to receive a transcript of your tax return. Enter the year you would like to request (i.e., for the 2021-2022 FAFSA, the 2019 tax year is required).
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their telephone request in 5 -10 days.
- Once you receive the Tax Return Transcript from the IRS, please include your student's full name and student ID before sending it to our office. It can be sent to our office via fax, email, or mail. If you are mailing it to our office, please keep a copy of the Tax Return Transcript for your records as the IRS will only provide one transcript free of charge per year.

### **Paper Request Form – IRS Form 4506T-EZ**

- Form can be downloaded at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>.
- Complete lines 1 – 4, following the instructions on page 2 of the form.
- **Do not complete Line 5. Tax Return Transcripts must be sent to the parents or student.**
- On line 6, enter the year you are requesting (i.e., for the 2021-2022 FAFSA, the 2019 tax year is required).
- The tax filers must sign and date the form and enter their telephone number. Sign the Form 4506T-EZ exactly as your name appeared on your original return.
- Mail or fax the completed form to the appropriate address or fax number provided on page 2.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request 5-10 days from the time the IRS receives and processes their signed request.
- Once you receive the Tax Return Transcript from the IRS, please include your student's full name and student ID before sending it to our office. It can be sent to our office via fax, email, or mail. If you are mailing it to our office, please keep a copy of the Tax Return Transcript for your records as the IRS will only provide one transcript free of charge per year.