

How to Provide Finalized Federal Income Tax Information

Finalized federal income tax information should be provided using the **Free Application for Federal Student Aid (FAFSA®) Internal Revenue Service (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](#), follow the directions below when you get to the ‘Financial Information’ section.

1. If you are eligible to link to the IRS, you will be able to select the “Link to IRS” button to be transferred to the IRS site. ([If you are not eligible to use the IRS DRT](#), you will not see this button.)
2. Provide the information requested from the IRS in order to confirm your identity. If the IRS site says it can’t find your data, make sure the information you entered matches your tax return exactly, including items such as abbreviations in your mailing address.
3. After confirming your identity on the IRS site, choose the option to “Transfer Now.” Note: For your protection, your tax return information will not display on the IRS site or on the FAFSA form, but we will inform you that the transfer was successful.
4. Once you’ve transferred your tax return information into your FAFSA form, navigate to the “Sign & Submit” page.
5. On the “Sign & Submit” page, read the certification statement and check the box indicating that you agree with the statement. Then select “Submit My FAFSA” at the bottom of the page.

If you’ve already submitted your FAFSA, but have not used the IRS Data Retrieval Tool, you should login to your FAFSA and transfer your final tax information if your 2020 tax return has been received **and processed** by the IRS.

Go to fafsa.gov and select “LOG IN.”

1. Select “I am the student” on the left side of the page.
2. Enter your FSA ID username and password and select “NEXT.”
3. On the “Disclaimer” page, click “ACCEPT.”
4. Select “Make FAFSA Corrections.”
5. Create a save key. (You’ll use this if you need to return to this correction later.)

You may get this message if you:	In this case, you should submit the following:
Filed an amended 2020 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 2020 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 signed copy of the applicable 2020 income tax return including Schedule 1, Schedule 2, and Schedule 3 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 & 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.

- Click "Get a Tax Transcript".
 - To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- 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 2022-2023 FAFSA, the 2020 tax year is required). Make sure to request the "**Return Transcript**" and NOT the "**Account Transcript**."
- 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 2022-2023 FAFSA, the 2020 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 10 business days from the IRS's receipt of the telephone 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.

Paper Request Form – IRS Form 4506T-EZ

- Form can be downloaded at <https://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 2022-2023 FAFSA, the 2020 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 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.