

2020 IRS Data Retrieval

Department of Education Regulation

The Department of Education now requires that you use the IRS DRT or provide us with a copy of your IRS Tax Return Transcript for use in verifying the data on your FAFSA.

Please note that it takes about two to three weeks for the IRS income information to be available for electronic IRS tax return filers, and about four to six weeks for paper IRS tax return filers.

*Students and/or Parents who completed a 2020 Amended Tax Form 1040X are ineligible to use the IRS DRT and must contact our office for instructions.

- Log into the Student's FAFSA at www.fafsa.ed.gov
- Choose the option Make Corrections.
- Using the Next and Previous buttons, navigate through the FAFSA, validating information as you do.
When you reach the information regarding tax data (for student and/or parent), be sure that the 2020 Tax Return Status is marked "Already Completed"
- Review the questions regarding eligibility to use the IRS Data Retrieval Tool - If you are not eligible please contact our office for further instructions.
- Click on the LINK TO IRS button
- Click OK on the page warning that you are leaving the FAFSA (Don't worry, it will bring you right back here)
- Enter the data from your 2020 taxes - Please note you must use the address listed on your 2020 Taxes – TIP: Use appropriate abbreviation such as St for Street and Ave for Avenue, also, do not use punctuation - If you are unable to access the data with the IRS Data Retrieval Tool please contact our office for further instructions.
- Click Submit.
- Review the information and mark the first box - Transfer my tax information to the FAFSA - and click Transfer Now
- ***Important*** Do Not change any data that is transferred from the IRS - This will invalidate the data transfer and will delay the processing of your file.
- Be sure to complete or update any boxes that do not show Transferred from the IRS - Including updating your working wages (use your W2s for this information).
- Sign and Submit the correction to your FAFSA - We will receive a new Student Aid Report showing the transferred data.

Please note that we may still be required to request a copy of your 2020 IRS Tax Transcript under certain circumstances. You will be notified if this is the case.

A **2020 IRS Tax Return Transcript** may be obtained through the:

- Online Request – Go to www.irs.gov, under the File heading on the IRS homepage, click "Individuals." Click "Get Your Tax Record." Click "Get Transcript by MAIL." Request the "IRS Tax Return Transcript."
- Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T