

FAFSA IRS Data Retrieval Tool & IRS Tax Return Transcript Request Processes

You have two options for fulfilling the Federal tax return financial aid verification process: use the IRS Data Retrieval Tool through FAFSA on the Web or request a Tax Return Transcript from the IRS. Either way is acceptable for purposes of financial aid verification. Note: These electronic processes will only be available **after** the tax filer has submitted their Federal tax return to the IRS; 3 weeks for electronic tax return submission and 6-8 weeks for filing a paper tax return.

IRS Data Retrieval Tool – for Linking Federal Tax Return to the FAFSA –

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you and/or your parent have not already used the tool, go to www.FAFSA.gov, log in to your FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you and/or your parent is eligible to use the IRS Data Retrieval Tool to transfer 2017 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

IRS Tax Return Transcript Request

Tax filers can request a transcript, free of charge, of their 2017 tax return from the IRS in one of four ways.

Request Transcript Online

Available on the IRS Web site at <http://www.irs.gov/Individuals/Get-Transcript>.

Get Transcript Online

To register and use this service, you need:

- Your Social Security Number, date of birth, filing status and mailing address from latest tax return,
- Access to your email account,
- Your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan,
- Mobile phone with your name on the account.

View, print or download your transcript.

Get Transcript by Mail

Must establish an account using:

- Social Security Number or ITIN number
- Date of Birth
- EXACT Street Address as used on tax return
- Postal Zip Code
- Security Questions

Transcripts are mailed within 5 to 10 business days.

Phone Request

Automated phone tool – 1-800-908-9946

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Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- On line 6, enter “2017” to receive IRS tax information for the 2017 tax year that is required for the 2019-2020 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

Verification of 2017 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2017, provide all of the following:

- A signed copy of the original 2017 IRS income tax return that was filed with the IRS or a **2017 IRS Tax Return Transcript** (signature not required) for the 2017 tax year.
- A signed copy of the 2017 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.
- A copy of the **2017 IRS Account Transcript** showing that the change(s) have been made by the IRS.

Verification of 2017 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who has been unable to obtain a **2017 IRS Tax Return Transcript** or use the IRS DRT must provide a signed copy of the 2017 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 “Identity Theft Affidavit” if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him or her to submit one, he or she may provide one of the following:

- A statement signed and dated by the individual indicating that he or she was a victim of IRS identity theft and that the IRS is investigating the matter. The statement must also indicate that the individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he or she was not required to file the form; or
- A copy of a police report if it was filed related to the IRS identify theft.