

# Obtaining IRS Tax Information

## Option #1: IRS Data Retrieval Tool (DRT) on the FAFSA

You cannot use this option if any of the following apply to you (or parents, if dependent):

- have not filed a tax return for the appropriate tax year
- are married and file separately; or
- are married and file as Head of Household;
- have not amended your tax return (filed a 1040X)
- a parent who does not have a Social Security Number

The best and fastest way to obtain your tax information for financial aid is to use the IRS Data Retrieval Tool (DRT) on the FAFSA. Follow the steps below if you did not use the IRS DRT when you initially completed the FAFSA.

1. Go to [www.fafsa.gov](http://www.fafsa.gov)



2. Click “**Login**” under the Returning User section. Enter your FSA ID and password

Student Information

Form Approved  
OMB No. 1845-0001  
App. Exp. 12/31/2017

Instructions are provided for each FAFSA question in the Help and Hints section on the right side of the page and are also available by clicking **Need Help?** at the bottom of the page.

Enter either your (the student's) FSA ID or personal information to log in to *FAFSA on the Web*.

Enter your (the student's) FSA ID       Enter the student's information

Do not log in with the FSA ID if you are not the student.

[Create an FSA ID](#)

FSA ID Username or Verified E-mail Address

[Forgot Username](#)

FSA ID Password

[Forgot Password](#)

OR

**NEXT**

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3. Select the correct academic year and click “**Make FAFSA correction**” towards the bottom of the page

[2016-2017](#) [2015-2016](#)

**Current Application Status: Processed Successfully**

Congratulations, your FAFSA was successfully processed.

**What Happens Next**

- Your FAFSA information was made available to the school(s) you listed on your FAFSA.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

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You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [Make FAFSA Corrections](#) to make a change, add a school, or transfer into your FAFSA

4. Create a Save Key for this correction (any 4 digit number)

App. Exp. 12/31/20

**Create a Save Key.**

The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

Create a Save Key

Re-enter Save Key

**NEXT** 

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## 5. Select NEXT

**Introduction Page - 2016-2017 Correction**

Use the **Next** and **Previous** buttons to move from page to page in the form. If you use your browser's back and forward buttons to move from page to page, you may lose your data.

[Making corrections to a processed FAFSA](#)

[How many steps does it take to complete?](#)

[How can I get help correcting my FAFSA?](#)

[Can I save my FAFSA if I can't finish it?](#)

[Signing the FAFSA](#)

[FAFSA on the Web Security and Privacy](#)


**NEXT**

## 6. Go to the “Financial Information” section (Note if you are a dependent student, you will need to do this process for yourself and your parents if you both filed an income tax return)

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
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**Student Demographic Information** **Help and Hints**

7. You will be asked whether you have filed the IRS income tax return for 2015. Select “**Already Completed**”, enter your “**Filing status**”, and the following questions will appear:
- Did you file a Form 1040x amended tax return (did you have to resubmit your taxes with corrections or amendments)?
  - Did you file a Puerto Rican or foreign tax return?
  - Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?

 To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):

Did you file a Form 1040X amended tax return?  
 Yes  No

Did you file a Puerto Rican or foreign tax return?  
 Yes  No

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?  
 Yes  No

If you answered yes to any of these questions, you are **NOT** eligible to use the IRS DRT, please refer to the other options on the second page. If none of these apply to you, the “**Link to IRS**” option will appear on your screen.

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8. It will then inform you that you will be “Leaving FAFSA on the Web” – click ok

**Leaving FAFSA on the Web**

You have entered answers to one or more income questions. *FAFSA on the Web* will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA.

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.

Click **OK** to continue. Otherwise, click **Cancel**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

9. Enter your information EXACTLY as it appears on your tax return, otherwise it will not link the information.
- If the information matches, the tax information for FAFSA will show up on the screen – click on “**Transfer Now**”. It will take you back to the FAFSA with the transferred information in the income fields. DO NOT make any changes to the numbers that have been automatically populated. Click continue and submit your FAFSA.
  - If the information does not match you will need to follow the instructions on the second page

Print this page for your records before choosing an option below.

**Transfer My Tax Information into the FAFSA** ?

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.  ?

**Do Not Transfer My Tax Information and Return to the FAFSA** ?

By clicking the “Do Not Transfer” button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.  ?

10. Once you submit your corrections you will see a list of all your changes made. Hit submit.

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
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**List of Changes**

You corrected your FAFSA. Review the information on this page and click **Submit** to submit your corrections.

11. Once you submit your application you will receive a confirmation page.

**2016-2017 Confirmation Page**

# Obtaining IRS Tax Information

## Option #2: Request a copy of tax return transcripts from the IRS

If you are unable to use the IRS Data Retrieval Tool, you will need to do one of the following to obtain a copy of your tax return transcript (Note that there is no fee or charge for requesting a copy of your tax return transcript)

- Call 1-800-908-9946 and request a copy via phone **OR**
- Request it online at [www.irs.gov](http://www.irs.gov) (follow instructions below)

On the main IRS webpage under Tools, click on “get a tax transcript”

The screenshot shows the IRS website's main navigation bar with the IRS logo on the left and a search bar on the right. Below the navigation bar are four main service tiles: 'File Your Tax Return', 'Get Your Refund Status', 'Pay Your Tax Bill', and 'IRS.gov En Español'. Underneath these are four columns of links: 'Forms and Pubs', 'Hot Topics', 'Tools', and 'Filing & Payment'. In the 'Tools' column, the link 'Get a tax transcript' is circled in red. Other links in the 'Tools' column include 'Apply for an online payment plan', 'Apply for an employer ID number', 'Change your tax withholding', and 'Check status of your amended return'.

You must then choose one of the options below:

The image shows two side-by-side panels. The left panel is titled 'Get Transcript ONLINE' and includes a document icon. It lists 'What You Need' (SSN, date of birth, filing status, mailing address, email account, credit card number, and mobile phone) and 'What You Get' (view/print/download transcript, transcript types available online, and username/password for return later). The right panel is titled 'Get Transcript by MAIL' and includes an envelope icon. It lists 'What You Need' (SSN or Individual Tax Identification Number (ITIN), date of birth, and mailing address) and 'What You Get' (transcripts arrive in 5 to 10 calendar days at the address on file, and transcript types available by mail).

Read the instruction on the following page. In order to access your tax transcript online you must register and have all the information requested ready or you can request to receive your return by mail.