IRS Data Retrieval Tool and Tax Transcripts

IRS Data Retrieval Tool (IRS DRT)

All 2015-2016 FAFSA filers who file a 2014 federal tax return should attempt to use the IRS Data Retrieval Tool (IRS DRT). The tool allows the student and/or parent to retrieve income information directly from Internal Revenue Service (IRS) and transfer that information to the FAFSA.

- **Electronic IRS tax return filers** should allow two weeks after filing the tax return for IRS income information to be available for the IRS DRT
- **Paper IRS tax return filers** should allow up to eight weeks after filing the tax return

If the IRS Data retrieval tool was not used when the FAFSA was filed:
- Go to FAFSA.gov
- Log in to the student’s 2015-2016 FAFSA record
- Select “Make FAFSA Corrections”
- Go to the Financial Information section of the form
- Follow the instructions to determine if the individual is eligible to use the IRS DRT to transfer 2014 IRS income tax information into the student’s 2015-2016 FAFSA

IRS Tax Return Transcript

Required when the IRS Data Retrieval Tool (IRS DRT) is Not Used

If the student is selected for verification of income and the IRS DRT was not used, an **IRS Tax Return Transcript** must be provided for **all tax filers** listing income information on the FAFSA.

How to request an IRS tax return transcript:
- Go to IRS.gov
- Click on the link for “Get Transcript of Your Tax Records”
- Click on “Get Transcript ONLINE”
- Follow the instructions for creating an account and requesting the on-line version of the transcript
- Print the transcript document
- Be sure to request a **Return Transcript** for tax year **2014**
- You may also request the tax return transcript be mailed to your IRS address on record

You will need the following information to request the transcript:
- Tax filer’s Social Security Number
- Tax filer’s Date of Birth
- Tax filer’s address on file with the IRS (normally this will be the address used when the 2014 IRS tax return was filed)
- It takes up to two weeks after filing the tax return for IRS income information to be available for **electronic IRS tax return filers**, and up to eight weeks for **paper IRS tax return filers**.
Frequently Asked Questions

1. I didn’t file a 2014 federal tax return. Do I have to use the IRS DRT or provide a tax return transcript?
   If you didn’t file a federal income tax return (and are not required to file a tax return) then neither the data retrieval tool nor a tax return transcript is required. If you worked in 2014, you must submit W-2 forms from all places of employment.

2. My parent(s) didn’t file a 2014 federal tax return. Does my parent have to use the IRS DRT or provide a tax return transcript?
   If your parent(s) didn’t file a federal income tax return (and are not required to file a tax return) then neither the data retrieval tool nor a tax return transcript is required. If your parent(s) worked in 2014, he/she must submit W-2 forms from all places of employment.

3. I filed my 2015-2016 FAFSA before I filed my federal tax return. Now that I’ve filed my federal tax return, can I still use the IRS DRT?
   Yes, you may be able to use the data retrieval tool. Remember that you should allow two weeks for IRS income information to be available if you filed your IRS tax return electronically and up to eight weeks for paper IRS tax return filers.

4. Why isn’t the IRS Data Retrieval Tool available to me?
   Tax filers who meet any of the following conditions cannot use the IRS Data retrieval tool:
   - A tax filer who recently filed a return (less than 2 weeks for electronic filers; less than 8 weeks for paper returns)
   - A tax filer who changed their tax return/filed an amended tax return
   - A married tax filer who filed the tax return as head of household
   - A married tax filer who filed the tax return as married but filing a separate return
   - A married tax filer whose marriage date is January 2015 or later
   - The first three digits of the tax filer’s Social Security Number are 666
   - A tax filer who does not have a Social Security Number
   - A tax filer who filed a Puerto Rican or foreign tax return