IRS Data Retrieval Tool and Tax Return Transcripts

IRS Data Retrieval Tool (IRS DRT)
All 2016-2017 FAFSA filers who filed a 2015 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 three 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 six weeks after filing the tax return after filing the tax return for IRS income information to be available for the IRS DRT

If the IRS Data retrieval tool was not used when the FAFSA was filed:
- Go to **FAFSA.gov**
- Log in to the student’s 2016-2017 FAFSA record
- Select “Make FAFSA Corrections”
- Go to the Financial Information section of the form
- Follow the instructions to determine if the student/parent is eligible to use the IRS DRT to transfer 2015 IRS income tax information into the student’s 2016-2017 FAFSA
  - *Married persons with a 2015 tax filing status that was any status other than “married filing joint,” are not eligible to use the IRS DRT and must provide a 2015 tax return transcript for all tax filers.*
  - If you have questions about you or your parents’ eligibility to use the IRS DRT, contact a Financial Aid Advisor at 501.569.3035.

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 3 weeks for electronic filers; less than 6 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 2016 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

- If the student is selected for verification of income and the IRS DRT was not used/could not be used, an IRS Tax Return Transcript must be provided for all tax filers listing income information on the FAFSA. More information about tax return transcripts is available on page 2 of this document.
- See page 3 for Frequently Asked Questions (FAQs)
IRS Tax Return Transcript

Required when the IRS Data Retrieval Tool (IRS DRT) Is Not Used or Cannot Be Used

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

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 2015 IRS tax return was filed)
- It takes up to three weeks after filing the tax return for IRS income information to be available for electronic IRS tax return filers, and up to six weeks for paper IRS tax return filers.
- **NOTE:** If married persons filed separate tax returns (any tax filing status other than “married filing joint”), a copy of the tax return transcript for each tax filer must be requested from IRS and submitted to the UALR Office of Financial Aid

**To request an IRS tax return transcript using the on-line request process:**

- Go to IRS.gov
- Click on “Get a Tax Transcript” under the “Tools” heading
- Click on the link for “Get a Tax Transcript by MAIL” and enter the required information
- Be sure to request a Return Transcript for tax year 2015
- The transcript will be mailed to your IRS address on record within 5 to 10 calendar days

**To request an IRS tax return transcript by phone:** 1-800-908-9946

- The transcript will be mailed to your IRS address on record within 5 to 10 calendar days

**To request an IRS tax return transcript by fax:** Complete IRS Form 4506T-EZ or IRS Form 4506-T and fax to the appropriate IRS office

- The transcript will be mailed to your IRS address on record within 5 to 10 calendar days
Frequently Asked Questions

1. I didn’t file a 2015 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 2015, you must submit W-2 forms from all places of employment.

2. My parent(s) didn’t file a 2015 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 2015, he/she must submit W-2 forms from all places of employment.

3. I filed my 2016-2017 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 three weeks for IRS income information to be available if you filed your IRS tax return electronically and up to six 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 3 weeks for electronic filers; less than 6 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 2016 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