

Instructions for Obtaining Your 2021 Federal Income Tax Return Information

FAFSA IRS Data Retrieval Tool

★ Recommended ★

The most efficient way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your FAFSA application.

In most cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

- Go to www.fafsa.gov and select Login.
- Select "Make FAFSA Corrections."
- Select the Financial Information tab and follow the instructions provided. Be sure to enter your address exactly as it appears on your Federal 1040.
- Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.



IMPORTANT: If you use the Data Retrieval Tool to link your tax information, please do not submit paper copies of your IRS Tax Return Transcript unless requested by the Financial Aid Office.

You Don't Want to Use the IRS Data Retrieval Tool?

If you are unable to use the Data Retrieval Tool, or you choose not to, you must submit a signed copy of your federal income tax return to the Office of Student Financial Aid.

Did You Forget to Keep a Copy of Your Federal Income Tax Return?

Online Request

- Go to www.IRS.gov.
- Click on "Get Your Tax Record."
- Select "Get Transcript by Mail," or "Get Transcript Online."
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

Telephone Request - 1-800-908-9946. The transcript is generally received within 10 business days.

Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

Tax Filers with Special Circumstances

Individuals Granted a Filing Extension by the IRS - Provide the following documents:

- a copy of the tax filer's IRS Form 4868 that was filed with the IRS for the tax year 2021;
- a copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2021;
- a copy of W-2 forms for **each** source of employment income received for the tax year 2021 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the tax year 2021 **and**
- Verification of Non-filing Letter (Request on IRS Form 4506-T confirming the tax return has not yet been filed) from the IRS dated on or after October 1, 2022.

Individuals Who Filed an Amended IRS Income Tax Return - Provide a signed copy of the 2021 federal income tax return filed with the IRS, use the FAFSA IRS Retrieval Tool or provide a transcript obtained from the IRS listing the tax account information of the filer and submit a signed copy of the 2021 IRS Form 1040X filed with the IRS or provide documentation from the IRS that include the changes made to the tax filer's tax information by the IRS.

Individuals Who Were Victims of Tax Administration Identity Theft - Call the IRS at 1-800-908-9946 to request a Tax Return Data Base View (TRDBV) transcript and submit a signed and dated statement from the tax filer indicating he or she was a victim of tax-related identity theft and the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-US Income Tax Returns – A tax filer who filed a 2021 income tax return with Guam, the Commonwealth of the Northern Mariana Islands, Puerto Rico or the U.S. Virgin Islands may provide a signed copy of the income tax return filed with the relevant tax authority. American Samoa tax filers must provide a copy of the 2020 tax account information. All other non-U.S. income tax return filers who indicate the 2019 tax account information cannot be obtain free of charge may submit a signed copy of the income tax return filed with the relevant tax authority along with documentation of the tax authority fee charges.