Attachment A: How to Use the IRS Data Retrieval Tool (DRT) via the FAFSA

IRS Data Retrieval Tool (DRT)

When completing a 2015-2016 FAFSA, students and parent(s) if married may use the Internal Revenue Service (IRS) Data Retrieval Tool to Import federal income tax information directly from the IRS into the FAFSA. This option is built into the online FAFSA application process.

NOTE: Please allow approximately three weeks from the date your electronically-filed federal tax return is accepted by the IRS to use the IRS Data Retrieval Tool via the FAFSA. If you filed a paper tax return, please allow 8-11 weeks for processing by the IRS.

Eligibility to Use IRS Data Retrieval Tool (DRT)

Students are eligible to use the FAFSA’s IRS Data Retrieval Tool if they:

- filed 2014 federal tax return with the IRS.
- filed with tax filing statuses of “Married” “Filing Jointly” or “Single.”
- have a valid Social Security Number.
- have a Federal Student Aid PIN (a PIN may be acquired as part of the process).

Students are not eligible to use the IRS Data Retrieval Tool if:

- the home address on the FAFSA does not match the address on the tax return.
- marital status changed after December 31, 2014.
- tax filing status is “Married, Filing Separately.”
- It was reported on the FAFSA that marital status is married, but tax filing status is “Head of Household.”
- filed an Amended Tax Return.
- filed a Puerto Rican or foreign tax return.
- filed a tax return using a Tax ID Number (TIN).
- did not or will not file a federal tax return.

Correcting a processed FAFSA to utilize the IRS Data Retrieval Tool

Those who filed a FAFSA prior to February 15 (before the DRT was available), and those who file federal taxes after the FAFSA has been submitted, may still take advantage of the IRS Data Retrieval Tool. You should access the IRS Data Retrieval Tool via the online “Correct your FAFSA” process at www.fafsa.gov. After you have done so, UWM will receive an updated copy of the student’s FAFSA reflecting the Income information you retrieved directly from the IRS.

- Go to www.fafsa.gov, log in, and click on “Make FAFSA Corrections.”
- Go to the “Student Financial Information” screen.
  - Under the IRS Data Retrieval section, enter the student’s federal aid PIN and click on “Link to IRS.”
  - Enter the address and tax filing status exactly as it appears on the student’s tax form. Click on “Submit.”
  - Review the tax information but DO NOT change any data at any point or it will not be considered “retrieved data.” Select “Transfer My Tax Information Into the FAFSA” and click on “Transfer Now.”
  - A message will confirm that the information was transferred.

Benefits of using the FAFSA’s IRS Data Retrieval Tool:

Aid applicants selected for Verification are required to submit federal Income tax information to the Financial Aid Department. Students who use the IRS Data Retrieval Tool, and do not change the Income Information in any way on the FAFSA, will not usually be required to submit Tax Return Transcripts to the school, reducing the number of documents required if selected for Verification.
Attachment B: How to Request a Tax Transcript

2014 Tax Return Transcripts

The Financial Aid Office must collect a Federal Tax Return Transcript for anyone selected for Verification who did not use the IRS Data Retrieval Tool on the FAFSA, was Ineligible to use the Tool, or if the data from the IRS was changed.

- Parents who are married but filing separately must submit 2 separate IRS transcripts.
- Tax filers are strongly encouraged to keep a copy of Tax Return Transcripts obtained from the IRS should they need copies in the future.

The IRS will provide a Tax Return Transcript free for any tax filer. Be sure to order a Tax Return Transcript because this is free. Requesting an actual copy of a tax return will cost money.

To obtain a Tax Return Transcript online, please follow these steps:

- Go to http://www.irs.gov/Individuals/Get-Transcript
- Choose “Get Transcript Online (recommended - you are able to view and print your transcript immediately) or “Get Transcript by Mail
- Select Create an Account
  - Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file
- Once account successfully set up, select “Higher Education/Student Aid” as the reason for requesting a transcript.
- Select “Return Transcript” for “2014.”
- Your requested transcript will open in new window. You should print a copy to submit to the Financial Aid Department, and make or print an additional copy for your own records.
- If you selected “Get a Transcript by Mail,” you can expect a return be sent the address listed on the return about 5 to 10 days from the time the online request was successfully transmitted to the IRS.

To obtain a Tax Return Transcript by phone, please follow these steps:

- Call the IRS at 1-800-908-9946 (7:00a.m. to 7:00p.m.).
- Tax filers must follow prompts to enter their Social Security Number and the numbers of their street address. Generally, these will be the numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Select “Option 2” to request an IRS Tax Return Transcript, and then enter “2014.”
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request within 5 to 10 days from the time the IRS receives the request.
- Once received, keep original and submit a copy to the Financial Aid Department.

IRS2Go (2 options):

- Google Play at

Paper Request Form:

- Complete IRS Form 4506T-EZ or IRS Form 4506-T
Attachment C: Unusual Tax Filing Situations

For Individuals Granted a Filing Extension by the IRS

If you had an extension and have since filed your taxes, you must either provide a tax return transcript or use the IRS Data Retrieval Tool on the FAFSA. If an Individual is required to file a 2014 IRS federal income tax return, and has been granted a filing extension by the IRS, provide the following documents:

- A copy of the IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year 2014; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2014 and, if self-employed, a signed statement certifying the amount of the Individual’s AGI and the U.S. income tax paid for tax year 2014.

For Individuals Who Filed an Amended IRS Income Tax Return

If an Individual filed an amended IRS federal income tax return for tax year 2014, provide both of the following:

- A signed copy of the original 2014 IRS Income tax return that was filed with the IRS or a 2014 IRS Tax Return Transcript (signature not required) for the 2014 tax year; and
- A signed copy of the 2014 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

For Individuals Who Were Victims of IRS Identity Theft

A victim of IRS Identify theft who is not able to obtain a 2014 IRS Tax Return Transcript or use the IRS Data Retrieval Tool (DRT) must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer’s Identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer’s 2014 IRS Income tax return information. The form the IRS provides to you must be turned into the Financial Aid Department.

Verification of 2014 Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns

If an Individual filed or will file a 2014 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, provide a signed copy of that 2014 Income tax return(s).