

## DATA RETRIEVAL INSTRUCTIONS

Students and parents who are eligible to use the IRS Data Retrieval Tool (IRS DRT) can access it from within the Free Application for Federal Student Aid (FAFSA) on the student or parent finances pages:

- Click **Link To IRS**. (**Note:** If you have already used the IRS DRT to transfer your tax return information into your application, click the “View option to link to the IRS” hyperlink.)
- Enter your FSA ID. (**Note:** The person whose tax information is being transferred should enter his or her own FSA ID. Students will not be asked to enter their FSA ID if they entered an FSA ID to begin their FAFSA.)
- Your FAFSA will be saved and you will be transferred to the IRS Web site.
- On the IRS Web site, enter the requested information exactly as it appears on your tax return. If you get an error that there’s no match, double check your information, including the exact mailing address on your return.
- Once authenticated with the IRS, you will be provided with information surrounding your IRS tax information. You can either transfer your information from the IRS, or choose to return to FAFSA on the Web.

If you use the IRS DRT to transfer your tax return information from the IRS, the information will not display on your FAFSA. For your protection, the answer to each question is replaced with “Transferred from the IRS.”

### Tax Return Transcript AND Verification of Non-Filing from the IRS

<p style="text-align: center;"><b>Verification of Non-Filing</b></p> <p>A non-filer is any Student or Parent (not filing a joint return) who did not work or did work, but did not file a <b>2021</b> Federal Income Tax Return. For the 2023-2024 academic year any parent or independent student who is a Non-Filer is required to provide a Verification of Non-Filing Letter from the IRS and all <b>2021</b> W2(s) and/or 1099(s) from each employer. A request to the IRS for a Verification of Non-Filing Letter can be made using the IRS “Get Transcript Online” tool at <a href="http://www.irs.gov/Individuals/Get-Transcript">www.irs.gov/Individuals/Get-Transcript</a> or by submitting IRS Form 4506-T and checking box 7.</p>	<p style="text-align: center;"><b>ONLINE</b></p> <ul style="list-style-type: none"> <li>• Go to <a href="http://www.irs.gov">www.irs.gov</a></li> <li>• Select <b>Get Your Tax Record</b> - You will have 2 options</li> <li>• Click “Get Transcript Online”</li> <li>• Log In OR Sign Up for an account</li> <li>• Select a reason you need a transcript: <b>Higher Education/Student Aid</b></li> <li>• Click “GO”</li> <li>• Select the year of the <b>Return Transcript</b> needed: <b>2021</b></li> <li>• Your transcript is ready to download!</li> <li>• Click “Get Transcript by Mail”</li> <li>• Enter Social Security Number, Date of Birth, Street Address, Zip Code. Select Continue</li> <li>• Type of Transcript = <b>Return Transcript</b></li> <li>• For Tax Year = <b>2021</b></li> <li>• Click on Submit (Your transcript will arrive within 10 business days.)</li> </ul>
<p style="text-align: center;"><b>BY PHONE</b></p> <ul style="list-style-type: none"> <li>• Call the IRS at 1-800-908-9946</li> <li>• Enter your social security number</li> <li>• Enter street address numbers</li> <li>• Option 2 (Tax Transcript)</li> <li>• Enter year: <b>2021</b></li> <li>• <b>No Customer File Number needed</b></li> </ul> <p>Your transcript will arrive within 10 business days.</p>	<p style="text-align: center;"><b>BY MAIL</b></p> <ul style="list-style-type: none"> <li>• Complete Form 4506-T or Form 4506T-EZ</li> <li>• Both forms are available online at <a href="http://www.irs.gov/individuals/get-transcript">www.irs.gov/individuals/get-transcript</a></li> <li>• Mail to the address indicated on the form</li> </ul>