

The Federal Department of Education policy for verifying Student and/or Parent Income requires the student and/or parent to use the **IRS Data Retrieval Tool** or obtain the **2023 IRS Tax Return Transcript**. The various IRS 1040 tax forms are NOT acceptable. Please do not send us a copy of those unless we specifically request it. *Our office cannot use it for the verification process.*

Instructions on completing the **IRS Data Retrieval** OR obtaining the **2023 IRS Tax Return Transcript**:

#### **IRS Data Retrieval**

*The best way to verify income is by using the IRS Data Retrieval Tool that is part of the FAFSA on the web. These steps are provided assuming you have FILED your taxes. Also, it takes up to two weeks for the IRS income information to be available for Data Retrieval for electronic tax filers and up to eight weeks for paper tax filers.*

Step 1: Go to Studentaid.gov/h/apply-for-aid/fafsa and click on the “Log In” button

Step 2: Select “I am the student” and enter the student FSA ID and password to log in to the FAFSA

Step 3: Select “Make FAFSA Corrections” hyperlink, select Next.

Step 4: Click on the *Financial Information* tab across the top. This screen shows Parent Tax information. (To get to Student’s Tax screen, scroll to bottom and click Next).

Step 5: Select “Already completed” for the question: “For 2023, have you completed your IRS income tax return or another tax return?”

Step 6: Check the appropriate box for your filing status, for most students would be ‘Single’.

Step 7: Select ‘No’ for the next question about filing a ‘Puerto Rican’ or ‘Foreign Tax Return.’ If you qualify, click on the button ‘Use IRS DRT’ or blue link below “View option to link to the IRS.” Follow the instructions given by FAFSA. If you do not qualify, cannot see the blue link, or have difficulty getting to the IRS website, you will need to follow the instructions below for requesting the **2023 IRS Tax Return Transcript**.

\*If you are a dependent student, you will need to do the Data Retrieval process for your parent(s) as well. You will go to the Parent Demographics section and do steps 4 and 5 above.

**Step 6:** After using the Data Retrieval Tool successfully, please make sure you advance to the end of the FAFSA screens, sign and agree for both student and parent, and “SUBMIT” FAFSA.

If you are unsuccessful in using the IRS Data Retrieval Tool, you may request a Tax Return Transcript from the IRS. Please see the next page below for instructions.

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### **Requesting the 2023 IRS Tax Return Transcript**

The IRS provides two methods to request the Tax Return Transcript. You can choose to order by Online, which if successful, will provide a download of the document within minutes, or order by postal mail, which may take up to two weeks to get.

For Online, follow steps in section A below, otherwise to order by mail, follow steps in section B below.

#### **Section A – Online**

Step 1: Go to <https://www.irs.gov/Individuals/Get-Transcript>

Step 2: Click on the blue “Get Transcript ONLINE” button. If you do not have an IRS account (most people don’t), you will need to create one and then follow the instructions and meet the criteria. If successful, you will be presented with the ability to download the **2023** Return Transcript, and you can attach and email it to me.

#### **Section B – By Mail**

It takes up to two weeks for the IRS income information to be available for electronic tax filers and eight weeks for paper tax filers. If you and/or your parents are married and filed separately on a **2023** Tax Return, you must submit each person’s transcripts.

You will need to know your **Social Security Number, date of birth, and the address on file with the IRS**.

Step 1: Go to <https://www.irs.gov/Individuals/Get-Transcript>

Step 2: Click on the blue “Get Transcript by MAIL” button.

Step 3: Enter your SSN (xxx-xx-xxxx format), your date of birth, street address only as shown your tax form (no city or state), and your zip code.

Step 4: Click the Continue button.

Step 5: Under “Type of Transcript” select “**Return Transcript**” from the dropdown.

Step 6: Under “Tax Year” select “2023”

Step 7: Click Continue. The screen should provide you status and delivery information.

**OR if you encounter difficulties, call: 1-800-908-9946**

\*Make sure to request the “**IRS tax return transcript**” NOT the “**IRS tax account transcript**”