



FAFSA-IRS Data Retrieval Tool

2020-2021 (How to use the tool and how to order a tax return transcript)

Students Selected To Verify Income

Students selected MUST choose one of the following options to verify income:

Applicants and parents selected to verify income can use the Data Retrieval Tool (DRT) to update their income information.
(EASIEST WAY!!)

OR

Request a 2018 Tax Return Transcript from IRS and submit it to Student Financial Services. Personal copies of tax returns cannot be accepted. There are 4 ways to request your tax transcript:

TO PRINT ONLINE: (Your transcript(s) will be prepared in a .pdf file for you to print/save for your records)

Visit <https://www.irs.gov/individuals/get-transcript> and complete steps

TO ORDER ONLINE (AND RECEIVE VIA MAIL): (Your transcript(s) will be mailed within 5 to 10 days from the IRS)

Visit <https://www.irs.gov/individuals/get-transcript> and complete request

TO ORDER BY MAIL/FAX (AND RECEIVE BY MAIL): (Your transcript(s) will be mailed within 5 to 10 days from the IRS)
Complete Form 4506-T (Request for Transcript of Tax Return)
Form 4506-T is available online at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>

Mail address/fax number is indicated on the form

TO ORDER BY PHONE: (Your transcript(s) will be mailed within 5 to 10 days from the IRS)

Call the IRS at 1-800-908-9946, and follow the prompts to order your Tax Return Transcript

IRS Data Retrieval Tool

About the DRT:

- The IRS DRT is expected to be available for online FAFSA submittals beginning October of 2019. The IRS requires a waiting period of 2-3 weeks after e-filing taxes or 6-8 weeks after filing taxes through the mail before the IRS DRT or Tax Return Transcripts become available.
- The DRT provides FAFSA applicants and parents with the ability to **transfer** income information directly from the IRS to the FAFSA.

Benefits of the DRT:

- Complete the FAFSA more easily and accurately!
- Increased accuracy in awarding financial aid funds!
- Applicants selected for verification can use the DRT to update their income information, without having to go through the hassle of obtaining a physical copy of their tax return transcript(s) from the IRS! *(Although there are instances where we may still require the transcript in addition to the DRT if further information is needed.)*

IRS Tool accessible through the FAFSA

www.fafsa.gov

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FAFSA®: Apply for Aid

Use the *Free Application for Federal Student Aid (FAFSA®)* form to apply for financial aid for college or grad school.

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Completing the FAFSA form is free. Fill it out now.

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Correct info • Add a school
View your *Student Aid Report (SAR)*

START HERE > **LOG IN >**

FAFSA® Announcements

- Check out the new **myStudentAid app** for iOS and Android.

Determining Who Can Use The IRS Tool

Student Tax Filing Status

Student Demographics School Selection Dependency Status Parent Demographics **Financial Information** Sign & Submit Confirmation

STUDENT INFORMATION

Application was successfully saved.

Because the FAFSA belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

For 2017, have you completed your IRS income tax return or another tax return?
Already completed

For 2017, what is your tax filing status according to your tax return?
Single

Did you file a Puerto Rican or foreign tax return for 2017?
 Yes No

IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

[LINK TO IRS](#)

PREVIOUS NEXT

Under the "[Financial Information](#)" section you will be asked a series of questions to determine whether or not you (or your parents) are eligible to use the tool.

Some common reasons an applicant or parent *may not* be able use the IRS tool:

- *The person did not indicate on the FAFSA that the tax return has been completed.*
- *The first three digits of the SSN are 666.*
- *The tax return was amended.*
- *The person filed a Puerto Rican or foreign tax return.*
- *The person is married and filed the tax return either as head of household or married but filing a separate return.*
- *Neither married parent entered a valid SSN.*
- *A non-married parent or both married parents entered all zeroes for the SSN.*

Linking To The IRS Website

Student Tax Filing Status

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

STUDENT INFORMATION

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For 2017, have you completed your IRS income tax return or another tax return? ?

Already completed

For 2017, what is your tax filing status according to your tax return? ?

Single

Did you file a Puerto Rican or foreign tax return for 2017? ?

Yes No

IRS Data Retrieval Tool

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[LINK TO IRS](#)

PREVIOUS NEXT

If you are eligible to use the IRS tool, you will be prompted to:

1. Enter you FSA ID number, then
2. Select **"LINK TO IRS"**
3. You will now leave FAFSA.gov, and temporarily enter IRS.gov in order to access and import your IRS tax information into your FAFSA.

FAFSA-IRS Data Link

 [Return to FAFSA](#) | [Log Out](#) | [Help](#)

[Español](#)

2016 Federal Income Tax Information

[REDACTED]


Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.


For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:


Tax Year	Type of Return Filed	Untaxed Pensions
Name(s)	Adjusted Gross Income	Untaxed IRA Distributions
Social Security Number	Income Earned from Work	Tax-exempt Interest Income
Filing Status	Income Tax	IRA Deductions and Payments
IRS Exemptions	Education Credits	Status of Amended Returns Received

Refer to your tax records if you have a question about the values you reported.


 Print this page for your records before choosing an option below.


Transfer My Tax Information into the FAFSA Form 

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.

Do Not Transfer My Tax Information and Return to the FAFSA Form 

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end, and you will return to your FAFSA form.





[IRS Privacy Policy](#)

Once you are connected to [IRS.gov](#).....

- Review your demographic information for accuracy.
- Select the appropriate box below.
- Select "[Transfer Now.](#)" You will then be returned to the FAFSA web site. Data transfer completed!

Transferred from IRS

Student IRS Info

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics Financial Information Sign & Submit Confirmation

STUDENT INFORMATION

✓ You have successfully transferred your 2017 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS." For your protection, IRS tax return information is not displayed on the FAFSA.

What income tax return did you file for 2017? ?
Transferred from the IRS

What was your adjusted gross income for 2017? ?
Transferred from the IRS

PREVIOUS NEXT

- You will not see the data on the FAFSA from your taxes. This means the data has been transferred!

SPECIAL ITEMS TO NOTE

- IRS Data Retrieval is available beginning [October 2019](#)
The IRS DRT is expected to be available for online FAFSA submittals beginning October 2019. The IRS requires a waiting period of 2-3 weeks after e-filing taxes or 6-8 weeks after filing taxes through the mail before the IRS Data Retrieval Tool or transcripts become available.
- Applicants and parents eligible and required to file a 2018 Federal Tax Return will be directed to use the DRT.
- Applicants and parents *not* required to file a federal income tax return are exempt from using the IRS DRT.
- Not all tax filers are eligible to use the data retrieval feature. (If you or your parent are ineligible, you will then be **required** to submit an **IRS Tax Return Transcript** to Student Financial Services.

How To Contact Student Financial Services

- Email: finaid@cascadia.edu
- Phone: 425-352-8860
- Location: Student Financial Services (in Kodiak Corner)
- Walk-in Hours: Available at www.cascadia.edu on the Kodiak Corner page