How to use the IRS Data Retrieval Tool to Update Your FAFSA

To Use the IRS Data Retrieval Tool

If you have not already used the tool, go to www.fafsa.gov, log in to your FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer your Federal income tax information onto your FAFSA. In most cases, for electronic filers, your tax return transcript may be available for DRT used within 2–3 weeks after your Federal Income Tax Return has been accepted by the IRS. Generally, paper filer’s return transcript may be available for DRT used within 8–11 weeks after your paper Federal Income Tax Return has been received by the IRS.

If you are not successful in using the IRS Data Retrieval Tool follow the below instruction:

To Obtain Your Tax Return/Account Transcripts/Verification of Non-filing/W-2 Statement and Form 1099/1098/5498 Series Transcripts

Only Account or Return Transcripts can be obtained from the IRS website. For any other statements or transcripts, you must complete a Form 4506-T and mail it to the appropriate address on the form.

For Account or Return transcripts go to www.irs.gov and click on “Get a Tax Transcript by Mail” under “Tools”. Click on “Get Transcript by MAIL” again. Use the Social Security Number and date of birth of the first person listed on your Federal Income Tax Return for the year requested, and the address on file with the IRS (normally this will be the address used on your Federal Income Tax Return). If your request matched, you will be prompted to select “Type of Transcript” and then “Tax Year”, make your selection and click “Continue”. You will get an acceptance message in the end.

(NOTE: Your transcript will be mailed to the address on your tax return so if you’ve moved, it will not come to your current address.)

If your request did not match, you will get an error message and be asked to try again or complete a Form 4506-T to get your transcript. Click on the link to Form 4506-T and print it.

Complete the form, select the appropriate box(es) and year, sign, date and mail it to the proper address as directed.

These two options will take up to ten (10) days for you to receive your tax transcripts/statements.

If you are unsuccessful with the above, you may request for a printout of your tax transcripts/statements at the nearest IRS tax offices. Please call to confirm business hours because different offices has different lunch hours.

Charlotte: 10715 David Taylor Dr., Ste. 1300
Charlotte, NC 28262
(704) 548-4100

If parents/spouse filed separate returns, tax return transcripts MUST be provided for both.