

# FAFSA CORRECTIONS & IRS DATA RETRIEVAL TOOL

*UIC College Prep's Best Practices for Assisting Families with FAFSA Updates/Corrections and IRS DRT:*

*IRS Data Retrieval Tool (DRT) is available First Sunday in Feb, and can be accessed about 2 weeks after parents file electronically.*

- **Parent and Student Do Not File** - review Student Aid Report and see if anything needs to be updated/corrected. If not, no corrections needed. DRT not possible.
- **Student is Independent** - Make updates only if the student files taxes or corrections need to be made. If student files taxes, update with DRT if possible.
- **Students to not bother with IRS DRT:** Both Parents Undocumented, Parents with 2 tax returns ("Married Filing Separately", "Unmarried by Living Together"), Filed Amended return  
→ *Make all income changes manually, order tax transcript(s) - see instructions*
- **Students to Try IRS DRT with:** Parent(s) Do Taxes, Has PIN - single parent or married parents file MFJ; parents filed electronically at least 2 weeks ago.

## IRS DATA RETRIEVAL TOOL TIPS

[IRS DRT Tutorial Video](https://www.youtube.com/watch?v=9ZNRdk3iXeM): <https://www.youtube.com/watch?v=9ZNRdk3iXeM>

- In the "Finances" Tab, change parent taxes to "Already Completed", double check tax filing status
- Say "No" to 1040X and Puerto Rican return, and even if not quite true, say "No" to "filed in the last 3 weeks" - otherwise it will not bring you to the IRS DRT as an option
- Enter Parent PIN and click "Link to IRS"

Once you get to the IRS website:

- Enter necessary info: Primary filer's name, DOB, Filing Status, Address - exactly as it is on Tax Return (no punctuation) - you may have to mess with abbreviations
- If tax info pops up, Click "Transfer to IRS" box and "Transfer Now" button - then do NOT change the transferred info.
  - *If there are two wage earners, must manually enter "parents income earned from work" for each parent because the IRS doesn't break down the total amount of wages between the two.*

Repeat for Student taxes if necessary. If student worked but didn't file, then update wages earned.

**Why Isn't IRS DRT Available for me?** If you're not seeing the IRS DRT, there may be a few reasons why: Neither parent has a SSN; You indicated **will file** or are **not going to file**; Parents are "unmarried living together" or you indicated MFS; The student/parent filed a Form 1040X amended tax return. If this is the case → ***Make all income changes manually, order tax transcript(s) - see instructions***

# IRS DATA RETRIEVAL PROCESS

ANSWER NO TO ALL THREE QUESTIONS TO GET THE IRS DRT OPTION:

P  
A  
R  
E  
N  
T

Parent Tax Information

**Help and Hints**  
**Recently Filed Taxes?**  
If you, the parent(s), filed your taxes electronically within the last 3 weeks, or by mail within the last 11 weeks, select **Yes**; otherwise, select **No**.  
  
If you filed your taxes within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#); however, if you are not able to transfer your tax return information into your FAFSA at this time, you can try again in a week or two or you can manually enter your tax return information.

✔ Application was successfully saved.

For 2014, have your parents completed their IRS income tax return or another tax return?

For 2014, what is your parents' tax filing status according to their tax return?

✔ **You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.**

Did you, the parents, file a Form 1040X amended tax return?  
 Yes  No

Did you, the parents, file a Puerto Rican or foreign tax return?  
 Yes  No

Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?  
 Yes  No

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your PIN and click [Link To IRS](#).

Which parent are you?

What is your (the parent's) PIN?  
**Reminder!** Your PIN can be used to electronically sign documents or access personal information. So it is important to remember that even if you are receiving help completing the FAFSA, you should not share your PIN with anyone assisting you.

[Apply For A PIN](#)  
[I Forgot/Don't Know My PIN](#)  
LINK TO IRS

THIS IS WHAT THE IRS WEBSITE WILL LOOK LIKE:

## Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information as it appears on your 2013 Federal Income Tax Return. Required fields \*

<b>First Name *</b>	<input type="text" value="John"/>
<b>Last Name *</b>	<input type="text" value="Doe"/>
<b>Social Security Number *</b>	*** - ** - 6375
<b>Date of Birth *</b>	05 / 17 / 1962
<b>Filing Status *</b>	<input type="text" value="Married-Filed Joint Return"/>
<b>Address - Must match your 2012 Federal Income Tax Return.</b>	
Street Address *	<input type="text" value="123 Main Street"/>
P.O. Box (Required if entered on your tax return)	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	<input type="text" value="United States"/>
City, Town or Post Office *	<input type="text" value="Anytown"/>
State/U.S. Territory *	<input type="text" value="California (CA)"/>
ZIP Code *	<input type="text" value="91234"/>

Select the button below to exit the IRS system and return to your FAFSA.

Return to FAFSA

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

Submit

AFTER HITTING SUBMIT, CHECK "TRANSFER MY INFO" AND CLICK "TRANSFER NOW"

## Requesting a Tax Return Transcript

Info Needed: Primary filer's SSN, DOB, Address from Tax Return

Navigate to: <http://www.irs.gov/Individuals/Get-Transcript> (or google "Get Tax Transcript")

Click "Get Transcript by Mail" (family can try Get Transcript Online to be able to print out immediately, but requires creation of username/password and answers to complex credit-related questions)

### Get Transcript

[Español](#)

You can get a transcript online or by mail to view your tax account transactions, line-by-line tax return information or wage and income reported to us for a specific tax year. The method you used to file your return and whether you have a refund or balance due, affects your [current year transcript availability](#). **Note:** If you need a photocopy of your return, you must use [Form 4506](#).

- To use **Get Transcript Online**, you must have a Social Security number (SSN) and immediate access to your email account to confirm your email address. Then you'll need to answer personal, financial and tax related questions to verify your identity. If you previously registered, just log in with your user ID and password.
- To use **Get Transcript by Mail**, you need your SSN or an [Individual Tax Identification Number \(ITIN\)](#), date of birth, and address from your latest tax return.

#### Get Transcript ONLINE

- Transcripts ready to view, print, or download immediately\*
- [Transcript types](#) available online
- [Frequently asked questions \(FAQs\)](#)

#### Get Transcript by MAIL

- Transcripts arrive in 5 to 10 calendar days at the address we have on file for you
- [Transcript types](#) available by mail
- Get Transcript by Mail [en Español](#)

\* The IRS never sends email requesting you to obtain, upload or access your transcripts. If you receive such an email, please forward it to our fraud group at [phishing@irs.gov](mailto:phishing@irs.gov).

ENTER REQUIRED INFO:

### Get Transcript

[En Español](#) | [Privacy Notice](#)

All fields are required

Social Security Number (SSN) or [Individual Tax ID Number \(ITIN\)](#) ?

-  -

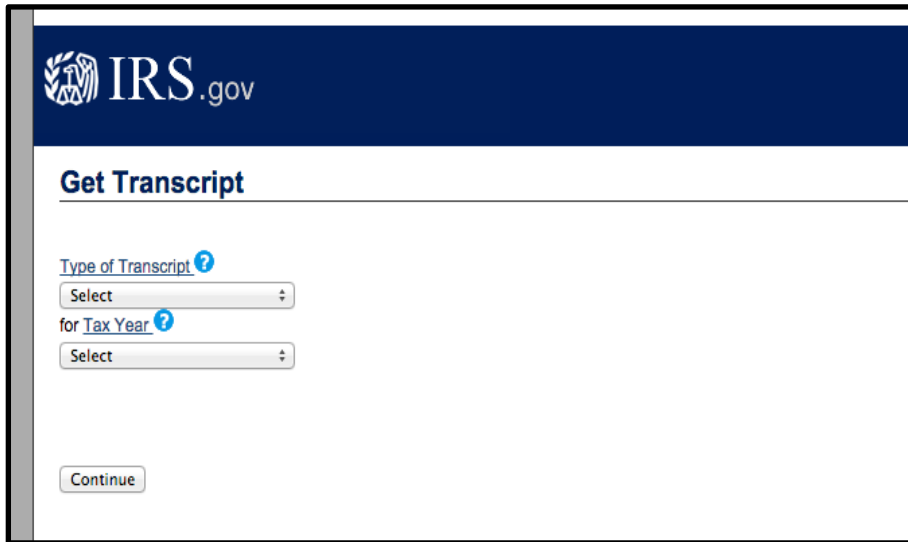
Date of Birth

Day  Month

Street Address ?

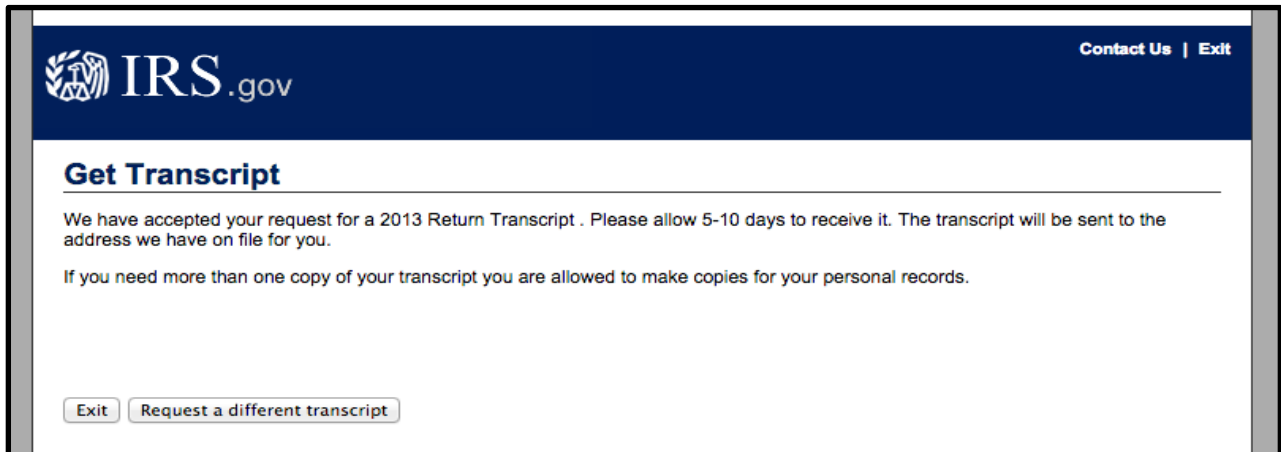
ZIP or Postal Code ?

ORDER A "RETURN" TRANSCRIPT, NOT AN "ACCOUNT" TRANSCRIPT!



The screenshot shows the IRS.gov website's 'Get Transcript' page. At the top left is the IRS logo and 'IRS.gov'. Below the header is the title 'Get Transcript'. There are two dropdown menus: 'Type of Transcript' with a question mark icon and a 'Select' option, and 'for Tax Year' also with a question mark icon and a 'Select' option. At the bottom left is a 'Continue' button.

SUCCESS LOOKS LIKE THIS:



The screenshot shows the success message on the IRS.gov website. At the top left is the IRS logo and 'IRS.gov'. At the top right are links for 'Contact Us' and 'Exit'. Below the header is the title 'Get Transcript'. The main text reads: 'We have accepted your request for a 2013 Return Transcript . Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you.' Below this is a note: 'If you need more than one copy of your transcript you are allowed to make copies for your personal records.' At the bottom left are two buttons: 'Exit' and 'Request a different transcript'.

TRANSCRIPT WILL BE MAILED TO THE PRIMARY TAXPAYER AT THE ADDRESS LISTED ON THE TAX RETURN.