





## How to use the IRS Data Retrieval Tool

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. **To use the Data Retrieval Tool, complete the following steps:**

- Go to [fafsa.ed.gov](https://fafsa.ed.gov) and select the “Start Here” button
- Log in using your FSA ID
- Select the “Continue” or “Make a Correction” button
- Select the "Financial Information" tab from the top of the page.

### Instructions for the parent to request the parent IRS information:

1. Go to "Parent Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, select which parent is providing information on the FAFSA
4. Enter the FSA ID for the parent providing the information
5. Click "Link to IRS"
6. For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see “Transferred from the IRS” in the appropriate fields on [fafsa.gov](https://fafsa.gov), the IRS DRT web page, and on the *Student Aid Report*.

### Instructions for the student to request the student IRS information:

1. Go to "Student Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, click "Link to IRS"
4. For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see “Transferred from the IRS” in the appropriate fields on [fafsa.gov](https://fafsa.gov), the IRS DRT web page, and on the *Student Aid Report*.
5. Proceed to the Sign and Submit page

If you are unable to complete the IRS Data Retrieval Tool, please submit an IRS tax transcript. The options are listed on the next page.

## How to Request an IRS Tax Transcript

Tax filers can request a transcript, free of charge, of their 2020 tax return from the IRS in one of three ways:

### **Option #1: Online Request**

Available on the IRS website at [www.irs.gov](http://www.irs.gov)

- Under the Tools heading on the IRS homepage, click **Get a Tax Return Transcript**
- Click **Get Transcript by Mail**
- Enter the tax filer's social security number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Click **Continue**
- In the **Type of Transcript** field, select **Return Transcript** and in the Tax Year field, select **the year you are requesting**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within five to 10 days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

### **Option #2: Telephone Request**

- Available from the IRS by calling **1-800-908-9946** (For victims of identity theft, please call 1-800-908-4490)
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Select **Option 2** to request an IRS Tax Return Transcript and then enter **the year you are requesting**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within five to 10 days from the time the IRS receives the request.

### **Option #3**

#### **Paper Request**

- Use IRS for 4506T-EZ,
  - Download at [irs.gov/pub/irs-pdf/f4506tez.pdf](http://irs.gov/pub/irs-pdf/f4506tez.pdf)
- Mail to the appropriate address located on page 2 of the form
- Wait 5-10 days upon receipt and processing of the form for delivery of your transcript

**Upon receipt of your IRS Tax Transcript, please submit to the Financial Aid Office.**

Defiance College  
Financial Aid Office  
701 North Clinton Street  
Defiance, OH 43512  
Fax: 419-783-2579  
Phone: 419-783-2376