

IRS DATA RETRIEVAL TOOL

Use the IRS Data Retrieval Tool to transfer your **2021** federal income tax information directly into the FAFSA.

ONLINE INSTRUCTIONS

- Go to StudentAid.gov
- Click **Apply Now**
- Click **Login**
- Enter the student or parent's FSA ID Username and Password and click **Next**
- Click **Make FAFSA Corrections**
- Create a Save Key and click **Next**
- Click on the applicable tab at the top of the page. For example, parents should click the **Parent Financials** tab.
- Select **Already Completed** for your tax return filing status and continue to answer the remaining questions.
- If you are eligible to use the IRS Data Retrieval Tool you will be able to click **Proceed to the IRS**
- Once you've been directed to the IRS website, enter all information as it appears on your 2021 tax return and click **Submit**
- Review the information that the IRS has retrieved from your tax returns. Check the box to **Transfer My Tax Information into the FAFSA Form** and click **Transfer Now**.
- Do not manually update any FAFSA questions that say **Transferred from the IRS** or your school may require you to supply additional documentation.
- Continue to answer the additional income questions.
- **Continue to the Sign & Submit tab. Follow all of the instructions carefully to submit your FAFSA corrections.**

NOTE: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financials tab and again under the Parent Financials tab.

TAX RETURN TRANSCRIPT

Parents or independent students that did not file a **2021** federal income tax return are required to provide an IRS Tax Return Transcript along with their Verification of 2021 Income Form.

REQUEST ONLINE

- Go to www.irs.gov
- Click "Get Your Tax Record"
- Select "Get Transcript Online"
(First-time users will need to create an account)
- Select a reason you need a transcript, **Higher Education/Student Aid**
- Customer File Number can be left blank.
- Select type of request, Return Transcript for tax year **2021**
- If your identity is successfully validated, non-tax filers will be able to view and download their Return Transcript.
- Submit the Return Transcript to PrattMWP's Financial Aid Office along with all other verification paperwork.

REQUEST BY PHONE

- Contact the IRS at 1-800-908-9946
- Follow the prompts to verify your identity.
- Select "Option 2" to request an Tax Return Transcript Letter and enter tax year **2021**
- If your identity is successfully validated, non-tax filers can expect to receive a Tax Return Transcript by mail within 5-10 business days.
- Submit the Tax Return Transcript to PrattMWP's Financial Aid Office along with all other verification paperwork.