



A MEMBER OF THE MINNESOTA STATE COLLEGES & UNIVERSITY SYSTEM

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Instructions for IRS Data Retrieval Tool

Quick Reference Guide

The IRS Data Retrieval Tool (DRT) is available to anyone that has e-filed their taxes at least 3 weeks earlier, or, in the case of paper filing, 11 weeks earlier. You will need to know the address used to file your taxes as well as your filing status, found under the name/address section of your 1040 tax form. To ensure that you are using the correct address, you may want to have a copy of your tax return with you when completing the IRS Data Retrieval process.

1. Log in to <https://studentaid.ed.gov/sa/fafsa>.
2. Click on **“Make FAFSA Corrections.”**
3. Click on **“Financial Information”** tab to reach the area where tax information is needed for student taxes. You need to be able to answer **“No”** to the series of questions at the top of the page. Once you do so, a blue **“Link to IRS”** button appears. **If you are unable to answer “No” to the questions, please follow instructions on the back of this form to get a Tax Return Transcript from the IRS.**
4. Click the **“Link to IRS”** button. The next screen will inform you that you are leaving FAFSA on the Web and will be transferred to the IRS website. Click **“OK”** to land at the IRS Data Retrieval Tool.
5. This screen will have your name and social security number. You will be asked for your filing status and the address you used on your taxes. Be precise as this information needs to match for the transfer to work successfully.
6. If the information matches, two options will appear at the bottom of the screen. The top option will transfer your tax information directly from the IRS into your FAFSA. The bottom option will decline the transfer.
7. Click the top option, **“Transfer My Tax Information into the FAFSA”** and click **“Transfer Now.”**
8. You will be redirected to the FAFSA where your tax information is now filled in. You will know that the transfer was successful if you see **“Transferred from the IRS”** next to the answer boxes. **Do not change any of the transferred data.**
9. Click **“Next”** at the bottom of the page.
10. Agree to the terms and then click **“SIGN.”** Then click on **“SUBMIT MY FAFSA NOW”** to resubmit your FAFSA. The corrections will not be done until the FAFSA is signed and submitted. The corrections will arrive in the Financial Aid Office in approximately a week.

If Parent Information is required on your FAFSA, go back to Step 3, click on the Parent Information tab, then proceed through the remaining steps.

****If you are unable to complete these steps for any reason, please see instructions on the back of this page for obtaining a paper copy of your tax documents****

Obtaining a paper copy of your IRS Tax Return Transcript, a Verification of Non-Filing Letter, Record of Account and/or Form W-2s

Tax filers can request a **Tax Return Transcript** to show proof of their tax filing. A **Verification of Non-Filing Letter** can be obtained as proof that the IRS has no record of a filed tax return for a prior tax year. **Form W-2s** can also be requested as proof of prior earnings/income. **Record of Account** can be obtained to clear up discrepancy with Adjusted Gross Income (AGI). There are two options for obtaining these forms:

Paper Request by Mail:

- Go to www.irs.gov/forms-pubs and click on Form 4506-T to download a Request for Transcript of Tax Return form
- Complete boxes 1-4 on the 4506-T form by filling in your own personal information, and skip line 5a and 5b
- Select the boxes next to lines 6 through 8 to request which specific forms you need mailed to you
- List the date 12/31/2020 in line 9
- Check the box directly above the signature line
- Sign the form and list today's date
- Send to the address listed on page 2 of the 4506-T form under Chart for Individual Transcripts. Once you receive the forms in the mail from the IRS, please bring them into the Financial Aid Office along with your student ID# or star ID.

In Person Request:

If you require face-to-face service at the Bloomington or St. Paul TAC office, call 844-545-5640 to schedule an appointment.

City	Street Address	Days/Hours of Service
Bloomington	1550 American Blvd. East Suite 700 Bloomington, MN 55425	Monday -Friday - 8:30 a.m.- 4:30 p.m.
St. Paul	430 North Wabasha St. St. Paul, MN 55101	Monday-Friday - 8:30 a.m.- 4:30 p.m.

* Note: If face-to-face assistance is not a priority for you, you may also get help with IRS letters or resolve tax account issues by phone, toll free at 1-800-829-1040 (individuals) or 1-800-829-4933 (businesses).

For more information on obtaining IRS documentation, please visit: <https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them>