

Verification Worksheet Instructions

Using the IRS Data Retrieval Tool

Access your FAFSA at www.studentaid.gov and log into your account. Once logged in, click on the option to “Make FAFSA Corrections” (this will take you to your completed FAFSA information).

If federal taxes have already been filed, you will be able to utilize the IRS DRT once you get to the Financial Information section. First, you must indicate that taxes were “Already completed”, then select the tax filing status and answer whether a Puerto Rican or foreign tax return was filed.

If you answer “No” then the IRS Data Retrieval Tool will be displayed. Click “link to IRS”. To complete the IRS DRT for a parent you will need to enter the parents’ FSA ID and password, click “Next”, then click “Proceed to IRS Site” and you will then be taken to the IRS website and asked to enter their information. Enter their name and address exactly how it appears on the federal tax return. If the tool can locate tax information, click the option to “transfer now”.

If you need to use the IRS Data Tool for the student, repeat steps for the student in the Student Financial Information section. Once you are done make sure to “next” through the rest of the FAFSA and complete the new submission on the “Sign and Submit” page.

Requesting an IRS Tax Return Transcript

For Tax Return Transcript go to www.irs.gov, click “Get My Tax Record”. Then choose “Get Transcript Online” or “Get Transcript by Mail”. To use the “Get Transcript Online” tool, users must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript is displayed online upon successful completion of the IRS’s two-step authentication.

Requests can also be made by telephone at (800) 908-9946 or by completing a 4506-T that can be mailed or faxed to the IRS. If you already have an account established, you can log in to access your Tax Return Transcript. In any case make sure that you request the “IRS Tax Return Transcript” and NOT “IRS Account Transcript”. The transcripts requested by “Get Transcript by Mail”, Phone and 4506-T are generally received within 10 business days from the IRS’s request.

Verification of Non-Filing Letter

Go to www.irs.gov, click “Get My Tax Record”. Then choose “Get Transcript online”. You must register with the IRS to use the online service to get the Verification on Non-Filing Letters. To use the “Get Transcript Online” tool, users must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript is displayed online upon successful completion of the IRS’s two-step authentication.

If you already have an account established, you can log in to access a Verification of Non-filing letter. Requests can also be made by telephone at (800) 908-9946 or by completing a 4506-T that can be mailed or faxed to the IRS. Verification of Non-filing letters requested by phone or 4506-T are generally received within 10 business days from the IRS’s receipt of your request.