

Dutchess Community College 2023-2024

Guide to Using IRS Data Retrieval Tool (DRT) & Tax Return Transcript Instructions

USING IRS DATA RETREIVAL TOOL

For video instructions on how to use the Data Retrieval Tool, please visit:

<http://www.bit.ly/howtodrt2>

Please note that you will not be able to use DRT if any of the following are true:

- Marital status changed after December 31, 2021.
- Filed "Married Filing Separately."
- Filed an amended return.
- Filed a foreign tax return.
- Filed a tax return using a Tax ID Number (TIN).
- The home address on the FAFSA does not match the address on the tax return.
- Applicants who have not and are not required to file a 2021 Federal Tax Return.

For applicants that cannot use the online IRS Data Retrieval Tool, please skip to the next page for instructions on how to request a Tax Return Transcript.

1. Log into www.FAFSA.gov.
 - a. Select the option to make a correction to your FAFSA.
 - i. NOTE: Be sure you are selecting the correct application. At certain times of the year, there may be two applications on file. If you are unsure which application to select, please contact the Office of Financial Aid
 - b. Go to the Financial Information tab.
2. Enter your Filing Status as reported on your tax return and answer the questions to determine if you qualify to use the IRS Data Retrieval Tool.
 - a. If you qualify, click "Link to IRS"
 - b. If you do not qualify, skip ahead to the instructions to request a Tax Return Transcript
3. Select "OK" when notified that you will be leaving the FAFSA website and brought to the IRS website.
4. Enter your personal information on the IRS website (Name, Social Security Number, Date of Birth, Filing Status, Address).
 - a. NOTE: Be sure to enter this information exactly as it appears on your tax return. For example, if your tax return lists your address as 1640 Riverside Dr., you should NOT type "Drive." You MUST type "Dr."
 - b. Click "Submit"
5. Check the box next to "Transfer My Tax Information into the FAFSA"
 - a. Click "Transfer Now"
6. Once the information has been transferred, you will be brought back to the FAFSA application and receive the message "You have successfully transferred your 20xx IRS tax information."
 - a. **DO NOT CHANGE ANY OF THE TRANSFERRED INFORMATION!**
 - b. Click next to continue the application process. Be sure to electronically sign the FAFSA and re-submit the application.

Would you prefer to request a Tax Return Transcript?

For video instructions on how to request a Tax Return Transcript, please visit:

<http://bit.ly/howtrt2>

Option 1: Online Request (Fastest Option)

- Go to irs.gov/transcript and select “Get Transcript Online”
 - **NOTE:** In order to use the online request, you must have your own credit card, mortgage, home equity loan, home equity line of credit, or a car loan AND a cell phone with your name on the account.
- If you have the information above, you may continue and enter your personal information and select Continue
- Select “Return Transcript” under the drop down for Type of Transcript and “2021” for Tax Year selection, then click continue
- You should now have a pdf copy of your tax return transcript, which you should print out and submit to our office. You should also save a copy to your computer for your records.

Option 2: Mail Request

- Go to irs.gov/transcript and select “Get Transcript by Mail”
- Enter your personal information and select Continue
- Select “Return Transcript” under the drop down for Type of Transcript and “2021” for Tax Year selection, then click continue
- You should now have completed your request and received a message stating that you will receive a copy of your tax return transcript within 5-10 days.

Option 3: Telephone Request

- Call the IRS at 1-800-908-9946
- Follow the prompts to verify your identity
- Select “Option 2” to request a Tax Return Transcript and then enter “2021”
- If successfully validated, you can expect to receive your tax return transcript within 5-10 days.

Option 4: Paper Request Form (4506-T)

- The 4506-T is available in our office and on our website, along with instructions for how to complete the form and where to send it.
 - Please note that this process can take up to 30 days to be completed and should only be used as a last resort.

Victims of Identity Theft

- If you are denied a Tax Return Transcript because of IRS identity theft, you will be referred to the Identity Protection Specialized Unit (IPSU) toll-free number at 800-908-4490. If you think that you are a victim of identity theft, you do not need to be referred to the IPSU; you may call the number directly or go to the ID theft website on irs.gov. After the IPSU authenticates your identity, you can request that the IRS mail to the tax filer an alternate paper tax return transcript.