**Frequently Asked Questions (FAQ’s) – IRS Data Retrieval Tool & Tax Transcript**

If the Department of Education requires you to submit certain documents to your school, the Financial Aid Office will inform you of what documents are required. The Department of Education specifies what documents the school must collect and use for verification of tax information.

When filing your 2022-2023 Free Application for Federal Student Aid (FAFSA), you will notice the U.S Department of Education has provided an IRS Data Retrieval Tool within the [FAFSA](https://fafsa.ed.gov/) web application. This tool will import 2020 tax line information into your FAFSA directly from the IRS. Not everyone will be eligible to use the retrieval tool, but you should use it if you can, as it may be beneficial to you. For example, if your application has been selected for verification, certain tax line data must be collected by your school and using the IRS Data Retrieval is one way to satisfy this requirement. Information about how/when to use this tool is listed below.

The following FAQs are provided to help you obtain your Tax Return transcript or submit your tax return if necessary. DO NOT submit tax information to the Financial Aid Office UNLESS it is specifically requested on a letter you receive from the Financial Aid Office or in an email to your UW Green Bay student email account. Note; your full tax return packet will never be requested/required. Only specific pages from your tax return are required and those pages are indicated on the requests we send and in the relevant questions below. If you have questions, contact the Financial Aid Office before sending in your full tax packet.

[**How do I use the IRS Data Retrieval Tool?**](#_How_do_I)

[**I used the IRS Data Retrieval Tool in the FAFSA, but I can’t see the amounts being populated in the FAFSA. Why is that and how can I see what is in the application to make sure it is accurate?**](#Security)

[**The Financial Aid Office is requesting a copy of my Tax Return Transcript or Tax Return. What are my options?**](#_The_Financial_Aid_2)

[**Do I need to sign my tax return transcript or tax return?**](#_Do_I_need)

[**The IRS says my tax return transcript is unavailable or they cannot locate it. What should I do?**](#_The_IRS_has)

[**Can I get multiple copies of my transcript if I am applying to more than one school?**](#_Can_I_get)

[**I used the IRS Data Retrieval on my FAFSA, and I had an untaxed retirement distribution that was a rollover – what do I do?**](#_I_used_the_1)

[**I filed a joint tax return but now I’m divorced or separated. What should I submit?**](#_I_filed_a)

[**I was single when I filed my tax return, but now I’m married. What should I submit?**](#_I_was_single)

[**I filed an amended tax return, what do I need to submit?**](#_I_filed_an)

[**I filed a foreign tax return for 2020, what should I do?**](#_I_filed_a_1)

[**I am a Non-tax filer. What do I need to submit?**](#_I_am_a)

**[Why wouldn’t I be eligible to use the IRS Data Retrieval Tool?](#_Why_wouldn’t_I)**

[**Contact Information- WI IRS Offices**](#_Contact_Information-_WI)

**I used the IRS Data Retrieval Tool in the FAFSA, but I can’t see the amounts being populated in the FAFSA. Why? How can I see what is in the application to make sure it is accurate?**

Data imported through the IRS Data Retrieval Tool is populated and text “Transferred from the IRS” appears due to cybersecurity reasons. The IRS mandated this change to protect the security of tax filer’s information. The Student Aid Report (SAR) will not show amounts. If you wish to see amounts populating the FAFSA, review your copies of your 2020 Federal Income tax return (form 1040 with Schedules 1, 2, and 3 and Form 8880 as applicable). Tax filers can request a [Tax Return Transcript](https://www.irs.gov/individuals/get-transcript) from the IRS if they did not keep a copy of their tax return.

# The Financial Aid Office is requesting a copy of my Tax Return Transcript. What are my options?

**OPTION 1:** Use the IRS Data Retrieval Tool to import tax line information into your FAFSA directly from the IRS. Not everyone will be eligible for this option. For information, see[**How do I use the IRS Retrieval Tool?**](#_How_do_I) (below) and follow the correction option. If successful, you may not need to submit tax documents to the Financial Aid Office. Data fields transferred from the IRS will show “Transferred From the IRS” and amounts will not display due to security reasons. The school will receive the corrected transaction in 1-2 weeks. The student should monitor his/her *To Do List* in SIS to make sure the request(s) for Tax Information are removed. If the Tax Information request(s) still appears two weeks after submitting the correction, contact the Financial Aid Office as Tax Information may still be required. If you cannot use the tool, see option 2 below.

**OPTION 2:** Tax filers who are unable to use the IRS Data Retrieval Tool or obtain a Tax Return Transcript from the IRS cansubmit a **physically signed** copy of the 2020 Federal Income tax return that was submitted to the IRS (Form 1040 with Schedules 1, 2, and 3 and Form 8880 as applicable), to the Financial Aid Office. A physical signature is **REQUIRED** on copies of tax forms. Refer to sample screen images of the 2020 IRS form 1040, Schedules 1, 2 and 3 and Form 8880 below. See (insert link) for full page sample tax return documents.

**Form 1040:**



**Schedule 1:**

 ****

 **Schedule 2:**

 ****

 **Schedule 3:**

 ****

 **Form 8880:**

 ****

**OPTION 3:** Contact the IRS to obtain a copy of your 2020 IRS Tax Return Transcript

***Online***: Go to [www.irs.gov](http://www.irs.gov) and click Get My Tax Record. **Note**: you must use the primary taxpayer’s information if you filed jointly.

* + - 1. Get Transcript ONLINE: If you already have an account with the IRS, log in. You can print a PDF copy of the 2020 Tax Return Transcript.
			2. Get transcript by MAIL: Request the 2020 Tax Return Transcript. You should receive the tax return transcript via US Postal Service within 10 business days.

***Phone***: Call 1-800-908-9946 and request the Tax Return Transcript. If you filed married filing jointly, you must know the primary taxpayer’s information in addition to your own information (full name, Date of Birth, SSN, tax filing status). You should receive the tax return transcript via US Postal Service within 10 business days.

Form [4506T-EZ](https://www.irs.gov/forms-pubs/about-form-4506t-ez) available online (this is a free request). See [**My Current Address is different from what is on my 2020 tax return. What do I do?**](#_My_current_address) (Below)

# Do I need to sign my tax return transcript or tax return before sending it to the Financial Aid Office?

It is recommended that you sign your tax return transcript, but it is not required. It is also helpful if you list the student’s ID number on the first page of each document submitted, especially if the taxpayer listed on the document is a parent or spouse.

A tax filer physical signature is **required** if you provide Federal tax returns – form 1040 with Schedules 1, 2, and 3 and Form 8880 as applicable.

# The IRS has informed me that my tax return transcript is unavailable or they cannot locate it. What should I do?

Submit a **physically signed** copy of the Federal Income tax return you submitted to the IRS for 2020 (form 1040 with Schedules 1, 2, and 3 and Form 8880 as applicable) to the Financial Aid Office.

# Can I get multiple copies of my transcript if I am applying to more than one school?

It is recommended that the tax filer use the [*Get Transcript*](https://www.irs.gov/individuals/get-transcript) option on the IRS website to get a tax return transcript from the IRS. The tax filer can make multiple copies of the transcript to send to other schools.

# [I used the IRS Data Retrieval on my FAFSA, and I had an untaxed pension distribution that was a rollover in 2020. What do I do?](#_I_used_the)

Tax filers with untaxed pension distributions can use the IRS Data Retrieval Tool to import tax line data into the FAFSA. If an amount greater than $0 is transferred from the IRS, the tax filer will be required to answer a question about whether or not that amount includes a rollover. If the tax filer answers “yes,” he/she will be required to provide the amount of the rollover in an entry field. The tax filer will use their own copy of their 2020 Federal tax return form 1040 (line 4a minus 4b) if the text ROLLOVER appears on your tax return. The Department of Education will subtract out the rollover amount entered when calculating the expected family contribution (EFC).

If you are unsure if the amount was a rollover, the tax filer can leave the amount as it populates in the FAFSA, sign and submit. Then submit a copy of your 1099-R to the Financial Aid Office. We will update your FAFSA if necessary. If the rollover was for a parent or spouse, please include the student’s ID number on the submitted documents.

# I filed a joint tax return but now I’m divorced or separated. What should I submit?

If requested by the Financial Aid Office, you must submit a copy of your joint 2020 tax return transcript. If you are unable to obtain a tax return transcript from the IRS, then submit a **physically signed** copy of your federal income tax return that was submitted to the IRS for 2020 (form 1040 with Schedules 1, 2, and 3 and Form 8880 as applicable) to the financial aid office. In addition, submit a copy of each tax filer’s W2(s) for 2020.

# I was single when I filed my tax return, but now I’m married. What should I submit?

If requested by the Financial Aid Office, you must submit a copy of an IRS tax return transcript for yourself and a separate IRS tax return transcript for your spouse. If unable to obtain the tax return transcript from the IRS, then submit a **physically signed** copy of your and your spouse’s federal income tax returns that were submitted to the IRS for 2020 (form 1040 with Schedules 1, 2, and 3 and Form 8880 as applicable) to the financial aid office.

# I filed an amended tax return, what do I need to submit?

If requested by the Financial Aid Office, submit your 2020 Tax Return Transcript (obtained from the IRS) AND a **physically signed** copy of your 2020 Amended return (Form 1040X) to the Financial Aid Office. If unable to obtain a tax return transcript from the IRS, submit a **physically signed** copy of the original federal income tax return that was submitted to the IRS for 2020 (form 1040 with Schedules 1, 2, and 3 and Form 8880 as applicable, as filed prior to amendments) along with a **physically signed** copy of your 2020 Amended return (form 1040X).

# I filed a foreign tax return for 2020, what should I do?

Submit a **physically signed** copy of your 2020 tax return along with copies of any income earnings statements.

# I am a Non-tax filer. What do I need to submit?

If tax information is requested by the Financial Aid Office and you were not required to file taxes for 2020, you’ll need to complete a Verification Worksheet from the Financial Aid Office. Check the box that says you did not and were not required to file. List all income sources with dollar amounts and submit to the Financial Aid Office along with **copies of ALL 2020 W-2 form(s)**. Independent student non-tax filers and parents of dependent students who did not file for 2020 must also submit a confirmation of non-filing letter from the IRS. You may obtain a confirmation of non-filing letter from the IRS online at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or by completing form 4506-T available at irs.gov. For more information and instructions for obtaining the confirmation of non-filing letter from the IRS, see 2020 Non-Tax filers information on our [website](https://www.uwgb.edu/financial-aid/forms/verification-forms/). If unable to obtain the confirmation of non-filling letter from the IRS, contact the financial aid office and request to speak with an advisor.

If you didn’t keep a copy of your 2020 W-2(s) – you can contact each employer to obtain a copy. Or contact the IRS (above options) and request a 2020 Wage and Income Transcript.

# Why wouldn’t I be eligible to use the IRS Data Retrieval Tool?

If any of the following apply to you, you may not be eligible to use the IRS Data Retrieval Tool:

* You filed taxes as married filing separately
* You are married and you filed taxes as Head of Household
* Your current marital status is different than it was in 2020
* You filed a Puerto Rican or foreign tax return
* Parent Marital status is “unmarried and both parents living together” (parent unable to use tool)

# How do I use the IRS Data Retrieval Tool?

**On the initial application:**

* 1. Go to [fafsa.gov](https://fafsa.ed.gov/) and click ‘Login’ (if you have filed a prior year FAFSA) or click ‘Start A New FAFSA’ (if this is the first year you will file a FAFSA). The student will sign in to begin either a ‘FAFSA Renewal Application’ or ‘Start 2022-2023 FAFSA.’ Fill in all information requested, verifying the accuracy of information.
	2. In the Financial Information Screen (for student and parent, if applicable), you’ll see the question, ‘*For 2020, have you completed your IRS income tax return or another tax return?’* If already completed, answer the eligibility questions, and, if eligible, the Link to IRS button will come up. Parent must indicate which parent and enter FSA ID and password, and click ‘Link to IRS.’ Pop-up windows will notify you that you are leaving the FAFSA site. Once on the IRS website, your name and SSN will appear and you fill in tax filing status and address information as found on your 2020 federal tax return (no punctuation). Click submit. If your information matches, check the transfer box and click the transfer now button on the right. If successful, data from your tax form will be brought back to the FAFSA website. You may be prompted to enter in wage information (review your W-2s box 1). The student (and parent, if applicable) would continue in the application and sign and submit the application. NOTE: If you are unable to successfully use the IRS Data Retrieval Tool, continue filling in the application, manually entering tax line data. Click the help icon (?) next to each field for the specific line to use for each field.

**As a correction to an already processed FAFSA:**

* 1. Go to [fafsa.gov](https://fafsa.ed.gov/) and click ‘Log in.’ After logging in, on the 2022-2023 Tab, click ‘Make FAFSA Corrections.’ The student’s original FAFSA data will come up. Scroll through the information using the ‘Next’ button until you reach the Financial Information section (Parent and Student are separate screens).
	2. Follow instructions noted in b. above.
		1. It is important to NOT update any other information in the FAFSA application UNLESS it was inaccurate at the time of original application.
		2. If you receive an error AND the Financial Aid Office has requested tax information from you then go to [Get a Transcript](https://www.irs.gov/individuals/get-transcript) from the IRS.

# Contact Information- WI IRS Offices

**Wisconsin IRS Offices**

Appleton 920-996-4860

Eau Claire 715-930-1663

Green Bay 920-662-5999

LaCrosse 608-785-0246

Madison 608-421-7898

Milwaukee 414-231-2100