Tax transcript tips for those filing a FAFSA for the 2019-2020 college semesters

When filling out financial aid applications, students and families may need to get tax information to complete the Free Application for Federal Student Aid form. The IRS Data Retrieval Tool is available to use with the 2019–2020 FAFSA Form. This tool is the fastest, most accurate way to input tax return information into the FAFSA form.

Students and parents who are eligible to use the IRS Data Retrieval Tool can access it from within the Free Application for Federal Student Aid.

Here is some information for applicants to help get tax return information for the FAFSA form.

- Applicants filing a 2019-20 FAFSA must use data from their 2017 tax returns.
- Taxpayers should always keep a copy of their tax return. Whether they keep it electronically or on paper, they should keep it in a secure place.

Here are some options for taxpayers who did not keep a copy of their tax return. They can:

- Access the tax software product used to prepare and file their 2017 return. They may be able to access their account to download and print a copy.
- Contact the tax preparer or provider who filed their 2017 return.
- Download their tax transcript at Get Transcript Online. They should remember to review the identity authentication requirements for Secure Access before attempting to register.
- Use Get Transcript by Mail. The IRS will mail a transcript to the address on their return within five to 10 days.
- Call the IRS's automated line at 800-908-9946 to order a transcript by mail.
- Taxpayers who filed an amended tax return, Form 1040X, should use the adjusted gross income and earned income listed on their revised tax return.

Finally, here's some information about getting alternative documentation for IDR applications.

- IRS Data Retrieval plan applicants must submit alternative documentation of income.
- The applicants submit this documentation to their federal loan servicers after completing and submitting the online IDR application.
- The process for submitting the alternative documentation of income is explained to borrowers as part of the online IDR application.
- Alternative documentation of income usually consists of copies of pay stubs or most recently filed tax returns.