

## Options for Submitting your 2021 Tax Information

For the 2023-2024 Free Application for Federal Student Aid (FAFSA) form, you must use federal tax information from your completed 2021 tax return. On occasion, The Department of Education will require institutions to confirm 2021 tax date listed on the FAFSA for the parent and/or student. Institutions can verify this information by the successful and unchanged use of the IRS Data Retrieval Tool, or by submitting a US Tax Return Transcript, IRS Tax Return 1040, Amended Tax Return Form 1040x or Foreign Tax Transcript. Below are the options for completing tax requests.

### **Option 1:** **IRS Data Retrieval Tool**

#### **How the IRS Data Retrieval works:**

If you and your parents have filed federal tax returns before starting the FAFSA, you will be able to transfer your tax information while completing the FAFSA. Families must actively choose to utilize the IRS Data Retrieval Tool. When you choose to do so, you will be transferred to the Internal Revenue Service web site. You will need to authenticate your identity before any personal information is displayed. Some families will not be able to use the IRS Data Retrieval Tool:

- If filed separate tax returns;
- If marital status changed after the end of the tax year on December 31, 2021;
- If have filed a foreign tax return.

If you are unable to use the IRS Data Retrieval Tool you must request an US Tax Return Transcript or IRS Tax Return 1040 to verify your income.

#### **Steps to use the IRS Data Retrieval:**

- Go to [fafsa.ed.gov](https://fafsa.ed.gov). Once you are at the home page you can then either login or start a new FAFSA if you have not already completed one.
- Across the top of the page you will see different tabs to click on, the **Financial Information Tab**.
- You must have already filed your 2021 Taxes before you can select “Already Completed” from the drop-down menu to use DRT.
- Select which parent you will be transferring tax information for from the drop-down menu.
- Enter the person’s FSA ID for which you will be transferring tax information.
- Click **LINK TO IRS**.
- A page will then pop up that you are leaving FAFSA and going to the IRS website, click **OK**.
- Once you are on the IRS website you will have to finish filling in the information asked for *exactly the way it is shown on your taxes* then click **SUBMIT**. If you are having issues with the address not being identical as on your tax return you may visit USPS.COM to verify that you have the correct address information.
- If your information has been authenticated, then at the bottom you will be asked whether you would like to transfer your information to FAFSA or not, check mark the box that says “Transfer my Tax Information into the FAFSA”, then click **Transfer Now**. (.)
- You will then be taken back to FAFSA where it will indicate **“Transferred from the IRS”**. Please note: You will not be able to view your income or tax data, either on the IRS website or once you have transferred it and will be asked for additional information that does not get transferred.
- Once you have signed and submitted, corrections will be sent to our office with your tax information from FAFSA in about a week.

## **Option 2:** **US Tax Return Transcript**

Tax filers can request a return transcript, **free of charge**, of their 2021 tax return from the IRS in one of five other ways.

### Online Request

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov).
- On the homepage, click “Get My Tax Record”.
- Click “Get Transcript Online” or “Get Transcript By Mail”.
- Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Enter the address and confirm it is the exact postal address being used.
- Click “Continue”
- In the Type of Transcript field, select “Return Transcript” and in the Tax Year field select “2021”.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request within 5 to 10 days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

### Telephone Request

- Available from the IRS by calling 1-800-908-9946
- Follow prompts to enter Social Security Number and the numbers in the street address. Usually, these will be the numbers of the street address that was listed on the latest tax return filed, but if IRS doesn’t find a match, use the address listed on the USPS website listed above.
- Select to request an IRS “Tax Return Transcript”, and then enter “2021”.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts by telephone cannot be sent directly to a third party by the IRS.

### Local IRS Offices

- You may be able to obtain a **Tax Return Transcript**
- Services are available **BY APPOINTMENT ONLY** at local IRS Offices. Call **1-844-545-5640** to schedule an appointment.

Local IRS Offices closest to PSU:

<b>City</b>	<b>Street Address</b>	<b>Days/Hours of Service</b>
Springfield	2937 S. Claremont Ave Bldg A Springfield, MO 65804	Monday-Friday 8:30 a.m. - 4:30p.m. (Closed for lunch 12:00 - 1:00 p.m.)
Overland Park	6717 Shawnee Mission Parkway Overland Park, KS 66202	Monday-Friday 8:30 a.m. - 4:30 p.m.
Wichita	555 N. Woodlawn Building 4 Wichita, KS 67208	Monday-Friday 8:30 a.m. - 4:30 p.m. (Closed for lunch 12:30 -1:30 p.m.)
Fayetteville	4375 N. Vantage Dr. 2 <sup>nd</sup> Floor Fayetteville, AR 72703	Monday-Friday 8:30 a.m. - 4:30 p.m. (Closed for lunch 11:30 a.m.-12:30 p.m.)
Tulsa	8023 E. 63 <sup>rd</sup> Place Suite 400 Tulsa, OK 74133	Monday-Friday 8:30 a.m. - 4:30 p.m.

**Option 3:**  
**IRS Tax Return 1040**

The IRS Tax Return 1040 is what individual taxpayers use to file their taxes with the IRS each year. These forms are retained by the tax filer after submission each year.

In order for our office to take in an IRS Tax Return 1040, the form must:

- Filed with the IRS,
- Signed by the tax filer on the 2<sup>nd</sup> page of the form to verify this is the correct form filed with the IRS. There is a section that states “Sign Here”,
- Turns in any additional Schedules 1, 2 or 3 you may have,
- And any additional documents specifically requested.

**Option 4:**  
**Amended Tax Return Form 1040x**

The Amended Tax Return Form 1040x is what an individual taxpayer would have when their taxes were initially filed but had to refile due to changes that were made. Our office would need the original IRS Tax Return 1040 listed in option 3 and the Amended Tax Return Form 1040x.

**Option 5:**  
**Foreign Tax Transcript**

Foreign Tax Transcript is for those individuals who filed taxes in a foreign country. Our office would need the equivalent to the US Tax Return Transcript/IRS Tax Return 1040 that was filed in another country.