

YOU HAVE THREE OPTIONS TO PROVIDE THE FINANCIAL AID OFFICE WITH YOUR 2020 FEDERAL TAX INFORMATION.

Option 1 (recommended): IRS Data Retrieval Tool (DRT) on your Free Application for Federal Student Aid (FAFSA)

The IRS DRT allows students and parents to transfer their 2020 tax data directly from the IRS. To use the DRT, follow these steps:

1. Go to fafsa.gov and click on the “Log In” button.
2. Click on the “I am a student and want to access the FAFSA form” button.
3. Click on the “Log in to Continue” button.
4. Enter your FSA Username and Password and click “Log In” button.
5. Click “Edit FAFSA Form” on the 2022-2023 FAFSA tab.
6. Create a Save Key and click on the “Continue” button.
7. Click on the “Enter Section” button on Section 6: Student Financials if you’re entering your information and the “Enter Section” button on Section 5: Parent Financials if you’re entering parent’s data. Select “Already Completed” for the tax return filing status, select the type of income tax return filed in 2020, and select the tax filing status as it appears on your/your parent’s 2020 federal tax return.
8. If you are eligible to use the IRS DRT, you can now click on the “LINK TO IRS” button. If you are not eligible to use the IRS DRT, please proceed to option 2 of these instructions to obtain a Tax Return Transcript. If you selected to skip the parent asset questions located at the bottom of the “Parent Financials” section, the option for the DRT will not present itself in the “Student Financials” section. You will need to go back to the “Parent Financials” section and answer the asset questions.
9. Click “Proceed to IRS site” to leave the FAFSA website and enter the IRS DRT website and click “OK” to acknowledge that you’re leaving the FAFSA website.
10. Click “OK” to accept the IRS DRT terms of use.
11. Enter the requested information and click “Submit”. Remember to enter your name, filing status, and address exactly how it’s displayed on your/your parent’s 2020 federal tax return.
12. Check the grey box to “Transfer My Tax Information into the FAFSA form” and click “Transfer Now”. Your IRS data will be transferred to your FAFSA, and you will be returned to the FAFSA website.
13. When you return to the FAFSA website, you will be promoted to enter wage information. This information will come from W-2 forms or the 1040 itself depending on your/your parent’s source of income.
14. Answer remaining questions and continue to the “Sign & Submit” tab. Please be sure to follow all of the instructions carefully to submit your FAFSA correction.

NOTE: If you are using the IRS DRT for both the student and parent, you will have to complete this process twice, once under the “Student Financials” section and once under the “Parent Financials” section before submitting the FAFSA.

Option 2: Send our office a 2020 IRS Tax Return Transcript (Please list student ID# on all pages)

There are multiple ways to obtain a 2020 Tax Return Transcript from the IRS. Any of these options will provide you with a Tax Return Transcript, Verification of Non-Filing, Account Transcript, or Wage and Income Transcript free of charge.

Online – Go to irs.gov/individuals/get-transcript and follow steps to either:

- select “Get transcript ONLINE” to view, print or download your transcript(s) (You must make an account and provide information similar to a credit check for this option), **OR**
- select “Get transcript by MAIL” Transcripts arrive in **5 to 10 calendar days** at the address on file with the IRS.

In person – Call (844) 545-5640 to schedule an appointment for pick up at the local IRS office, located at 201 Thomas Johnson Drive, Frederick MD 21702.

Via Mail – Call (800) 908-9946 to have transcripts mailed to the address on file with the IRS.

Mail form 4506-T – Visit irs.gov/pub/irs-pdf/f4506t.pdf to print and mail to the IRS. You will first need to fill in “1040” for option 6, select option 6a from the list, and fill in 12/31/2020 under option 9 and complete all other necessary information, plus your signature and date. Mail the 4506-T directly to the IRS using the address chart given in the instructions. If our office specifically asks you to provide a 2020 Verification of Non-Filing you will need to select options 7 and 8 on form 4506-T. You will also need to fill in 12/31/2020 under option 9. If you are asked to provide a 2020 Wage and Income Transcript, you will need to select option 8.

Option 3: Provide our office with a signed 2020 personal tax return

If you choose this option, you will need to submit your Federal Tax Return (2020 IRS 1040) with all schedules. Please do not submit your Maryland State Tax Return. If you self-prepared your taxes using a service, such as TurboTax, you will be required to physically sign your tax return on page 2 of IRS 1040 on the line that indicates “Sign Here”.