

2020-2021

Completion of the IRS Data Retrieval Process (DRT) & Tax Return Transcript (TRT) Information

Students whose financial aid application is selected for verification are required to provide 2018 tax data for themselves and their parents (if requested). There are three ways to provide this data:

1. **IRS Data Retrieval Tool** – Fastest, most reliable way to transfer tax data into FAFSA
2. **IRS Tax Return Transcript** – Copy of data listed on the tax return, as processed by the IRS
3. **Signed and complete copy of the tax return you submitted to the IRS (IRS Form 1040 with all schedules and attachments)**

Important: Students and parents may submit Tax Transcripts or copies of tax returns to the University of San Diego Office of Financial Aid through:

- **tax document upload links** in the student's Financial Aid Requirements on the mySanDiego portal, or
- **by mail** to the Office of Financial Aid, University of San Diego, 5998 Alcala Park, San Diego, CA 92110.
 - Write the student name and ID number on any tax documents submitted by mail.
 - Tax documents, including returns, W-2 and 1099 forms may not be accepted via email.

IRS Data Retrieval Process within FAFSA on the Web

A taxpayer (student or parent) may use the IRS Data Retrieval Tool if:

- The taxpayer completed and filed a 2018 Federal Tax Return
- The taxpayer has a valid Social Security Number (SSN)
- The taxpayer has a Federal Student Aid ID (username and password used to access federal student aid websites [fafsa.gov and studentloans.gov] and mobile app [myStudentAid])
- The taxpayer DID NOT file as "Married Filing Separately"
- The taxpayer DID NOT file as "Head of Household" if your current marital status is "married"
- The taxpayer DID NOT file a Puerto Rican or Foreign Tax Return

How do I use the IRS Data Retrieval Tool (DRT)?

1) To use the DRT, log on to the FAFSA website and proceed to the parent and/or student financial section where it will prompt you to enter your parents'/your filing status for the 2018 Tax Year.

The screenshot shows the 'Parent Tax Filing Status' form. At the top, a progress bar indicates the following steps: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics (checked), Financial Information (current step), Sign & Submit, and Confirmation. Below the progress bar, a green message box states 'Application was successfully saved.' A blue information box with a question mark icon says 'Attention! You must provide financial information from your parents' 2018 tax return on the following pages.' The form contains three questions: 'For 2018 have your parents completed their IRS income tax return or another tax return?' with a dropdown menu set to 'Already completed'; 'For 2018 what is your parents' tax filing status according to their tax return?' with a dropdown menu set to 'Married-filed Joint Return'; and 'Did your parents file a Puerto Rican or foreign tax return for 2018?' with radio buttons for 'Yes' and 'No' (selected). Below these questions is a dark blue box for the 'IRS Data Retrieval Tool' with a 'LINK TO IRS' button. At the bottom right are 'PREVIOUS' and 'NEXT' buttons.

2) Answer the question with regard to Puerto Rico or foreign tax return to see if it is possible to transfer your parents'/your 2018 Federal Tax information directly from the IRS.

3) When you choose "Link to IRS", your parent will be prompted to complete the information presented on the screen below. When complete, click "Next."

The screenshot shows the 'Parent Log In to IRS DRT' form. At the top, a progress bar indicates the following steps: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics (checked), Financial Information (current step), Sign & Submit, and Confirmation. Below the progress bar, a blue information box with a question mark icon says 'You, the parent, should enter the information below and click Next to continue. Otherwise, click Skip IRS DRT. If you have any questions or problems using this tool, click FAFSA Help for assistance.' The form is titled 'Provide Parent's FSA ID' and contains three questions: 'Which parent are you?' with radio buttons for 'Parent 1' (selected) and 'Parent 2'; 'Parent's FSA ID Username or Verified E-mail Address' with a text input field; and 'Parent's FSA ID Password' with a text input field. There are also links for 'Forgot Username' and 'Forgot Password'. At the bottom right are 'SKIP IRS DRT' and 'NEXT' buttons.

4) On the following screen select “Proceed to IRS Site.”

Student Leaving FAFSA

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

STUDENT INFORMATION

Leaving FAFSA on the Web

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site. Your FAFSA information will be saved.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.

For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.

SKIP IRS DRT PROCEED TO IRS SITE

5) You will be directed to the IRS’s website, where you will authorize the IRS to submit your tax information to FAFSA.

IRS.gov Return to FAFSA | Log Out | Help Español

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2018 Federal Income Tax Return. Required fields *

First Name *	GDIT
Last Name *	DATA
Social Security Number *	
Date of Birth *	
Filing Status *	
Address - Must match your tax return	
Street Address *	
P.O. Box (Required if you use a P.O. Box)	
Apt. Number (Required if you use an apartment)	
Country *	
City, Town or Post Office *	
State/U.S. Territory *	
ZIP Code *	

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

Return to FAFSA Submit

6) Each tax filer (both the student and parent) must list his/her complete name and address **exactly** as it appears on the federal tax return when retrieving the IRS tax data for the IRS-DRT to process successfully. Once all required fields are complete, click **Submit**.

7) If successful, the next screen will display information from the federal tax return, along with the corresponding lines on the FAFSA. If you wish to transfer this information, click **Transfer Now**. The USD Office of Financial Aid recommends you transfer the **unaltered** tax information retrieved from the IRS DRT.

8) You will then be directed back to the FAFSA website, where the data fields transferred from the IRS will display “Transferred from the IRS”.



9) After transferring IRS data into your FAFSA, both the student and parent must sign and resubmit your FAFSA with USD’s school code (**010395**). If the FAFSA is not submitted after the DRT is used, the tax information will not transfer to USD.



10) Remember to complete the IRS DRT process for both the student and parent(s) if both filed returns.

I used the IRS Data Retrieval Tool, but my Financial Aid Portal still shows the tax return status as outstanding, why is that?

- Make sure that you electronically signed and resubmitted the FAFSA after you used the DRT, otherwise the tax information will not transfer to USD.
- It can take up to a week for the updated FAFSA to be received by USD. Continue to monitor your portal for the update.

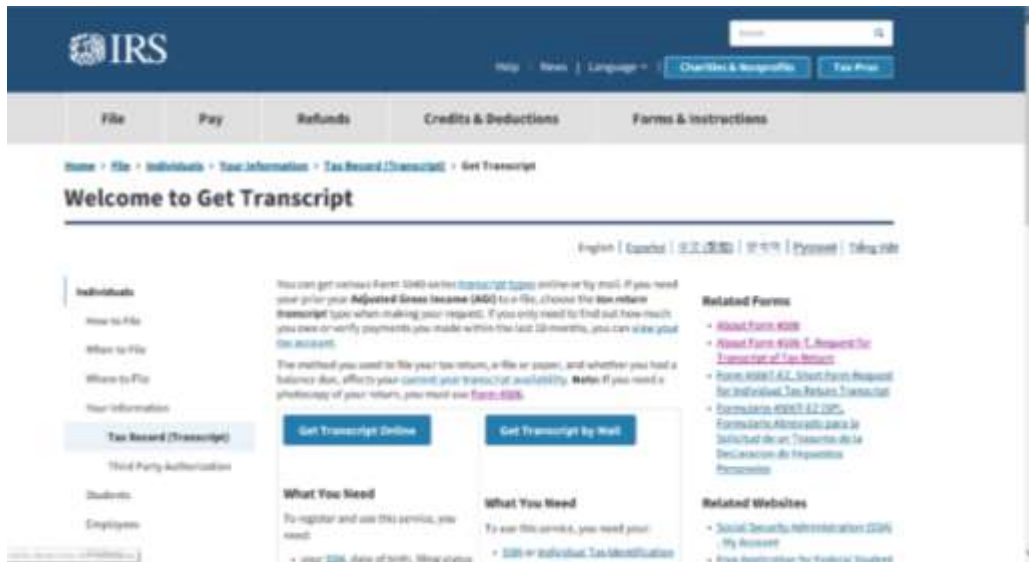
How can I obtain a Tax Return Transcript if I do not want to use the Data Retrieval Tool, or am ineligible to use it?

To obtain a copy of your Tax Return Transcript from the IRS you may:

- A) Request a digital copy online** – Download copy of transcript, print, and submit via mail
- B) Request a physical copy by phone** – Receive transcript 5-10 days after IRS processes request
- C) Request a physical copy by mail** – Receive transcript 5-10 days after completed request form is processed by the IRS

A) Requesting a digital copy online

You may obtain a Tax Return online by visiting www.irs.gov/Individuals/Get-Transcript.



Click on **Get Transcript ONLINE** to get started.

Sign up for an online account if you don't already have one.



Sign In

User ID

Mask User ID

[Forgot User ID](#)

Sign Up

You must sign up to create or reactivate your account.

[IRS Privacy Policy](#) | [Accessibility](#)

Gather the items needed.

Get Transcript Online	Get Transcript by Mail
What You Need To register and use this service, you need: <ul style="list-style-type: none">• your SSN, date of birth, filing status and mailing address from latest tax return,• access to your email account,• your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and• a mobile phone with your name on the account.	What You Need To use this service, you need your: <ul style="list-style-type: none">• SSN or Individual Tax Identification Number (ITIN),• date of birth, and• mailing address from your latest tax return
What You Get <ul style="list-style-type: none">• All transcript types are available online• View, print or download your transcript• Username and password to return later	What You Get <ul style="list-style-type: none">• Return or Account transcript types delivered by mail• Transcripts arrive in 5 to 10 calendar days at the address we have on file for you

B) Requesting a Tax Return Transcript by phone

- 1) Call: 1-800-908-9946
- 2) Provide **Social Security Number**
- 3) **Verify your address** when prompted
- 4) Enter the tax year **2018** when prompted

C) Requesting a Tax Return Transcript by mail

To request that a transcript be mailed to you, click **Get Transcript by MAIL** on the **Get Transcript** page shown above and you will be directed to this screen:

IRS.gov [Contact Us](#) | [Exit](#)

Order a Transcript [En Español](#) | [Privacy Notice](#)

All fields are required

Social Security Number (SSN) or [Individual Tax ID Number \(ITIN\)](#) ?

... - .. - 6789

Date of Birth

17 May 1962

[Street Address](#) ?

123 Main Street

[ZIP or Postal Code](#) ?

91234

[Continue](#)

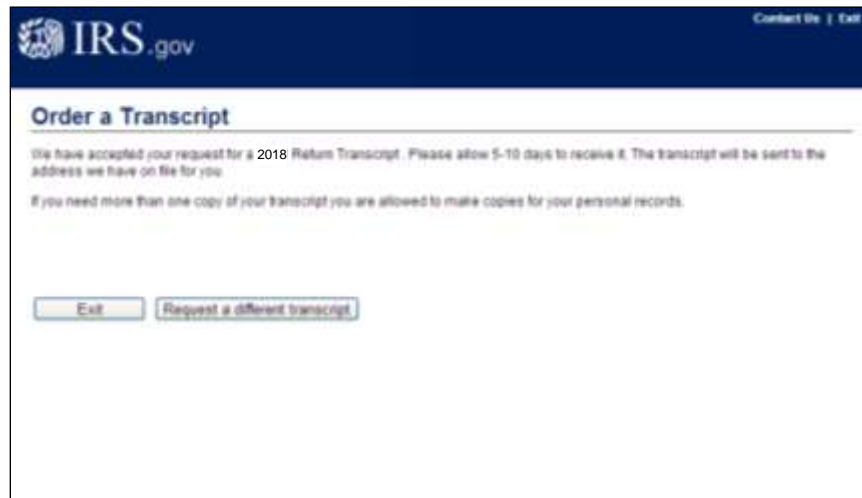
Enter your information **exactly** as it appears on your federal tax return. Click **Continue**.



The screenshot shows the IRS.gov website interface for ordering a transcript. At the top left is the IRS logo and ".gov" domain. At the top right are links for "Contact Us" and "Exit". The main heading is "Order a Transcript". Below this, there are two dropdown menus: "Type of Transcript" with "Return Transcript" selected, and "for Tax Year" with "2018" selected. A "Continue" button is located at the bottom of the form area.

For **Type of Transcript**, please select **Return Transcript**. Please select the appropriate Federal **Tax Year** and click **Continue**.

You will receive this confirmation screen after submitting your information to the IRS.



The screenshot shows a confirmation screen on the IRS.gov website. At the top left is the IRS logo and ".gov" domain. At the top right are links for "Contact Us" and "Exit". The main heading is "Order a Transcript". Below the heading, there is a confirmation message: "We have accepted your request for a 2018 Return Transcript. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you." Below the message, there is a note: "If you need more than one copy of your transcript you are allowed to make copies for your personal records." At the bottom, there are two buttons: "Exit" and "Request a different transcript".

Once you receive your TRT, please submit a copy to the USD Office of Financial with **the student's name and ID number** to prevent any delays in processing.