IRS Data Retrieval Option for 2019-20 FAFSA

We strongly recommend that parents and students select the IRS Data Retrieval Tool option when filing the FAFSA. This option will streamline and expedite the processing of your financial aid application.

IRS Data Retrieval Tool Instructions

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. To use the Data Retrieval Tool, complete the following steps:

- Go to https://studentaid.ed.gov/sa/fafsa and select the “Log In” button
- Log in using your FSA ID
- Select the “Continue” or “Make a Correction” button
- Select the “Financial Information” tab from the top of the page

Instructions for the parent to request the parent IRS Information:
1. Go to “Parent Financial Information” tab
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool (if you are not eligible to use the tool, you must submit your 2017 Tax Return Transcript to our office.)
3. If eligible, select which parent is providing information on the FAFSA
4. Enter the FSA ID for the parent providing the information
5. Click “Link to IRS”
6. For your privacy, the tax information you transfer from the IRS into your FAFSA form won’t be visible to you. Instead, you will see “Transferred from the IRS” in the appropriate fields on your FAFSA, the IRS DRT web page, and on the Student Aid Report.
7. Proceed to the Sign and Submit page

Instructions for the student to request the student IRS Information:
1. Go to “Student Financial Information” tab
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool (if you are not eligible to use the tool, you must submit your 2017 Tax Return Transcript to our office, see page 2 for instructions)
3. If eligible, click “Link to IRS”
4. For your privacy, the tax information you transfer from the IRS into your FAFSA form won’t be visible to you. Instead, you will see “Transferred from the IRS” in the appropriate fields on the FAFSA, the IRS DRT web page, and on the Student Aid Report.
5. Proceed to the Sign and Submit page
VERIFICATION OF TAX INFORMATION

IRS Data Retrieval through the FAFSA:

Use the **IRS Data Retrieval Process** to submit correct tax information. You will not be required to submit a federal tax return transcript once our office receives the unaltered retrieved IRS information. **This option will streamline and expedite the processing of your financial aid application.** For instructions, visit [www.csuchico.edu/fa/forms/irs-data.shtml](http://www.csuchico.edu/fa/forms/irs-data.shtml).

OR

If you are unable to use the IRS Data Retrieval Process, you will be required to submit a **Federal Tax Return Transcript** or a copy of your 1040 with all schedules attached.

Where to Request Tax Return Transcripts:

Do not request delivery of Tax Return Transcripts directly to our office. Please submit a copy of the Federal Tax Return

<table>
<thead>
<tr>
<th>Request Method</th>
<th>Where?</th>
<th>What?</th>
<th>When?</th>
<th>Directly Mailed to CSU, Chico?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td><a href="http://www.irs.gov/transcript">www.irs.gov/transcript</a></td>
<td>Order electronic transcript online or paper transcript by mail</td>
<td>Immediate for electronic or 5-10 days by mail</td>
<td>No</td>
</tr>
<tr>
<td>IRS2Go Mobile App</td>
<td><a href="https://play.google.com/store/apps">App available at Google Play Store, App Store or Amazon (free)</a></td>
<td>Paper</td>
<td>5-10 days</td>
<td>No</td>
</tr>
<tr>
<td>Telephone</td>
<td>(800) 908-9946</td>
<td>Paper</td>
<td>5-10 days</td>
<td>No</td>
</tr>
<tr>
<td>IRS Form 4506T-EZ</td>
<td><a href="https://www.irs.gov/form4506tez">www.irs.gov/form4506tez</a> (print the form and mail or fax it to the IRS)</td>
<td>Paper</td>
<td>5-10 days from IRS receipt of form</td>
<td>No</td>
</tr>
</tbody>
</table>

Transcript or Federal Tax Return with the student’s name and Chico State ID printed at the top right corner of each page. If you fax a transcript to our office, please be aware that tax return transcripts are two-sided.