

# Updating your FAFSA: IRS Data Retrieval Tool

The **IRS Data Retrieval Tool (DRT)** is the best way for you to update your income information. DRT will allow you to transfer tax information directly from the IRS to the FAFSA. However, some families are not eligible to use DRT and must request a tax transcript from the IRS. Check your eligibility for DRT below before you go to the [studentaid.gov](http://studentaid.gov) website.

## What you will need:

- ✓ Student's Social Security number and date of birth
- ✓ Parent's Social Security number and date of birth (for dependent students)
- ✓ FSA ID Username
- ✓ FSA ID Password
- ✓ Mailing address and tax filing status from student's and/or parents' income taxes

## Are you eligible for the Data Retrieval Tool?

Some families will not be eligible to use the IRS Data Retrieval Tool. If any of the following situations apply to you, you are **NOT ELIGIBLE** to use the tool:

- Tax filing status is Married Filing Separately
- Tax filing status is Head of Household and you are married
- Filing an amended tax return
- Filing a foreign tax return

If the student's FAFSA is selected for verification, the student **must** submit a tax return transcript.



Student Financial Services Office  
1350 West Street  
Pittsfield MA 01201  
Phone: (413) 499-4660  
[OneStop@berkshirecc.edu](mailto:OneStop@berkshirecc.edu)

## IRS Data Retrieval Process:

1. Go to [studentaid.gov](http://studentaid.gov).
2. Log in with your FSA ID Username & Password.
3. Select "**Make FAFSA Corrections**" and use the "Next" button at the bottom of each page to navigate to the Financial Information section.
4. You will see a "**Link to IRS**" button if you are eligible to use the IRS DRT.
5. If eligible, the student/parent will be asked to enter his/her FSA ID before linking to the IRS website.
6. Once at the IRS site, enter student/parent information exactly as it appears on federal income tax return and click the "**Submit**" button.
7. Check the "**Transfer My Tax information into the FAFSA form**" box, and click the "**Transfer Now**" button.
8. You will know that the federal tax return information has been successfully transferred because the words "**Transferred from the IRS**" will display in place of the IRS information in the FAFSA form.
9. If completing this process for a dependent student, repeat steps for both student and parent tax information.
10. **Submit your FAFSA corrections.**

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# Requesting IRS Tax Transcript, Verification of Non-filing, and/or W-2:

If you are unable to complete the IRS Data Retrieval Tool (DRT), did not file a 2021 federal tax return, and/or do not have a copy of your W-2(s) or 2021 tax return, you will need to apply for the information directly from the IRS. All information is provided to the student/parent directly and it is the responsibility of the student to provide copies to the BCC Student Financial Services Office.

## Need a Tax Return Transcript?

1. To request a transcript, call 1-800-908-9946

OR

2. Go to: [www.irs.gov](http://www.irs.gov)
3. Choose the “**Get Your Tax Record**” option.
4. If you no longer reside at the address supplied on your 2020 tax return, you can request the transcript by completing Form 4506T-EZ or Form 4506-T. Forms can be found by visiting [www.irs.gov](http://www.irs.gov). You will receive a copy of your Tax Transcript by mail in approximately 5-10 calendar days.

*Note: If you filed an amended tax return, you need to submit a Tax Return Transcript and a signed copy of the 1040X.*

## Need Verification of Non-filing?

(proof from the IRS that you did not file a return for the 2021 tax year)

1. Go to: [www.irs.gov](http://www.irs.gov)
2. Choose the “**Search Forms & Instructions**” and search for **4506-T**.
3. Complete the 4506-T form and submit it to the IRS. You will receive a copy of your Verification of Nonfiling by mail in approximately 5-10 calendar days.

**If you have questions or need help,  
please call the Student Financial  
Services Office at 413-499-4660.**

### Our Hours Are:

8:00 – 4:00

Monday  
Tuesday  
Wednesday  
Thursday  
Friday

## Need Form W-2?

1. First contact the payer (your employer) and request a duplicate copy.
2. If the payer is unavailable, go to: [www.irs.gov](http://www.irs.gov)
3. Choose the “**Search Forms & Instructions**” and search for **4506-T**.
4. Complete the 4506-T form and submit it to the IRS. You will receive a copy of your W-2 information by mail in approximately 5-10 calendar days.



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