

In March 2017, the IRS and the Department of Education's Office of Federal Student Aid (FSA) disabled the IRS Data Retrieval Tool (DRT) in FAFSA due to security concerns. The DRT is used by families to electronically transfer their verified tax data from the IRS database, into the FAFSA. Per a statement from both the IRS and FSA, the DRT will be down until the 2018-19 FAFSA is available (October 1, 2017) while they implement extra security within the system.

As of April 24, 2017, the Department of Education announced new flexibilities for completing verification during the 2016-17 and 2017-18 verification cycles. We can now accept a signed paper copy of the 2015 IRS Tax Return that was used by the tax filer for submission to the IRS.

For students and families who need to provide verified tax information for verification, resolving conflicting information, and special circumstance adjustments, they can request a Tax Return Transcript (TRT) using the following methods. Please ensure you request the **Tax Return Transcript** and not the Tax Account Transcript. Account Transcripts will not be accepted.

- **Online:** <https://www.irs.gov/individuals/get-transcript>
 - **Get Transcript Online:** By creating an account online, taxpayers can print and/or download the transcript to their device. To create an account, certain information is needed including, but not limited to: social security number, an email address, a mobile phone number with your name on the account, and the personal account number of a credit card, mortgage, loan, or line of credit.
 - **Get Transcript by Mail:** You can request a transcript be mailed to the address on your tax return. Mailed transcripts will arrive within 5-10 business days.
 - If you no longer live at your filing address, you will need to complete IRS **Form 8822 Change of Address** [\[Link\]](#) with the IRS before requesting the transcript.
- **Phone:** Transcripts ordered over the phone will be mailed to your tax-filing address within 5-10 business days.
 - **Automated Transcript Request Line:** 800-908-9946
 - **IRS Live Assistance Line:** 800-829-1040
 - It is commended you use this number if you are having issues in which you need a live agent to assist you.
- **IRS Form 4506-T:** <https://www.irs.gov/uac/about-form-4506t>
 - By completing page 1 of this form and mailing or faxing it to the locations indicated on page 2, they will mail the transcript to your tax-filing address within 5-10 business days.
 - **Do not complete box 5:** Box 5 instructs the IRS to mail the transcript to a third-party. Do not select this option to send to WMU as we will receive it without a WIN. Transcripts without a WIN will be returned to the taxpayer address listed on the transcript, which will delay the process.

Having issues with one of the methods mentioned above?

- Schedule an appointment with your local Taxpayer Assistance Center: <https://www.irs.gov/help-resources/contact-your-local-irs-office>
- Contact the IRS Live Assistance Line: 800-829-1040
- Contact the IRS Identity Theft Assistance Line if you are a victim of Identity Theft: 800-908-4490.
- If you have requested a "credit freeze" through one of the 3 major credit bureaus, contact them to have the freeze temporarily lifted, as a freeze will prevent you from requesting your transcript.