

Student Federal Tax Information

Student Financial Services will only accept tax return information directly from the Internal Revenue Service. We CANNOT accept individual taxpayer copies of Federal Tax Returns or that of a paid tax preparer. The instructions below apply to you and your spouse (if married). There are two ways to submit tax information to Colorado State University:

1. IRS Data Retrieval Tool (DRT) available your FAFSA under the tax information section.

Student and spouse (if married) who have filed their current year taxes will be given the option to use the IRS Data Retrieval Tool when completing the financial information portion of the FAFSA application. This option is available approximately 2 weeks after electronically filing Federal Income Tax returns and 8 weeks after mailing Federal Income Tax returns.

- Must have a valid **FSA ID** when completing the FAFSA.
- Must have valid Social Security Number(s).
- Must have filed a current year Federal Income Tax Return electronically 2-3 weeks prior to filing out the FAFSA or 8-11 weeks if Federal Income Tax Returns were mailed, prior to filling out the FAFSA.
- Must have an unchanged marital status as of December 31, of the previous year.

2. Official Tax Return Transcripts.

If you did not or cannot use the IRS Data Retrieval Tool to transfer Federal Tax Return information to your FAFSA, you will need to obtain an official Federal Income Tax Return Transcript from the IRS and submit it to our office.

Tax filers can request Federal Tax Return Transcript information free of charge by:

- Logging onto the IRS website service **Get Transcript**. Click on the "Get Transcript by Mail"
- Telephone request by calling 1-800-908-9946
- Completing a paper request form using IRS **Form 4506**

3. Note on Tax Extensions: If you or your spouse (if married) filed a Federal Tax Return extension:

- A copy of you and your spouse (if married) current year IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Returns." It must be filed with the Internal Revenue Service, *and*
- Copies of you and your spouse (if married) current tax year IRS W-2 forms from each place of employment. If self-employed, a signed statement certifying the amount of each individual's approximate earnings for the current tax year.

Once the tax extension information and earnings statements are reviewed, we will **offer student loans**, if eligible. Grant eligibility will be re-evaluated once we receive your filed. **Federal Tax Return Transcript(s)** or tax information via the IRS Data Retrieval Tool available on the student FAFSA.

For more information regarding the IRS Data Retrieval Tool, please visit our [website](#).