

Using the IRS Data Retrieval Tool (IRS DRT)

How to link your IRS tax return information directly to your FAFSA

If your FAFSA was selected for verification review by the Department of Education, the Financial Aid Office is required to verify your tax information that was reported on your FAFSA. To meet verification requirements, families can either:

- Transfer the tax information directly to the FAFSA using the IRS Data Retrieval Tool (best option)
or
- Submit a copy of the IRS Tax Return Transcript (obtained from the IRS, not a personal copy of the return itself)

If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using it for several reasons:

It's the easiest way to provide your tax data, it's the best way of ensuring that your FAFSA has accurate tax information and you won't need to provide a copy of your tax return transcript.

Step 1: Go to www.fafsa.gov and "Login".

Step 2: Enter your FSA Username and Password and click "next".

Step 3: Choose "Make FAFSA Corrections".
"next".

Step 4: Choose "next" and create a "save key" and click

Step 5: Follow the prompts to transfer your tax return information. The screenshot below is in the student section of the FAFSA.

Step 6: If you are eligible to use the IRS Data Retrieval Tool, you can now click on “ok” to access the IRS site.

Step 7: Click “ok”.

Step 8: Enter the requested information. The address must match the address listed on the tax return.

Step 9: Review the information. Check the box to “Transfer my tax information into the FAFSA” and choose “transfer now”.

Step 10: Once your information has been transferred, do not update any responses that say “Transferred from the IRS”. Answer the additional questions and click “next”.

Student 2015 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers
Tax Year	2015	
Name(s)	Dependent Data	
Social Security Number	*** - ** - 2581	
Filing Status	Single	Question 34 on the FAFSA
Type of Tax Return Filed	1040EZ	Question 33 on the FAFSA
Adjusted Gross Income	\$9,750	Question 36 on the FAFSA
Income Earned From Work	\$20,125	Question 39 on the FAFSA
Income Tax	\$7,025	Question 37 on the FAFSA
IRS Exemptions	5	Question 38 on the FAFSA

Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

Do Not Transfer My Tax Information and Return to the FAFSA

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.

[IRS Privacy Policy](#)

Federal Student Aid PROUD SPONSOR OF THE AMERICAN MIND® **FAFSA**
Free Application for Federal Student Aid

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

Student Financial Information

You have successfully transferred your 2015 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS."

What income tax return did you file for 2015? **Transferred from the IRS**

IRS 1040A or 1040EZ **Transferred from the IRS**

What was your adjusted gross income for 2015? This amount is found on IRS Form 1040A-line 21 or 1040EZ-line 4.
\$ 9,750 **Transferred from the IRS**

Your income earned from working (wages, salaries, tips, etc.) in 2015 was transferred from the IRS. This amount is found on IRS Form 1040A-line 7 or 1040EZ-line 1.
\$ 20,125 **Transferred from the IRS**

Help and Hints

Student's Type of 2015 Tax Form Used Question 33

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

If the answer to this question is not pre-filled, you must select the income tax return that you filed or will file for 2015:

- IRS 1040
- IRS 1040A or 1040EZ
- A foreign tax return
- A tax return for a U.S. territory or a Freely Associated State (including Puerto Rico).

Please Note: If you are using the IRS Data Retrieval Tool for both the student and parent, you will need to repeat this step for the parent under the Parent Financial Information section before submitting the updated FAFSA.

Step 11: Continue to the “Sign and Submit” tab. Follow instructions carefully and make sure that all required persons sign using the FSA ID.

Step 12: Let us know you successfully used the IRS DRT

Sign With an FSA ID

Parent Signature - Sign With an FSA ID

Mother's/Stepmother's Social Security Number [XXXXXXXX-XX-XX]

Mother's/Stepmother's last name [Last Name]

Mother's/Stepmother's date of birth [MM/DD/YYYY]

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid FSA ID, username and password, and/or any other credential, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked:

- to provide information that will verify the accuracy of your completed form
- to provide U.S. or state income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

I, the parent, agree to the terms outlined above. Agree Disagree

What is your (the Mother's/Stepmother's) FSA ID?

FSA ID Username or Verified E-mail Address []

FSA ID Password []

Student Signature - Sign With an FSA ID

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid FSA ID, username and password, and/or any other credential, YOU, THE STUDENT, certify that you:

- will use federal and/or state student financial aid only to pay the cost of attending an eligible institution of higher education.
- are not in default on a federal student loan or have made satisfactory arrangements to repay it.
- do not owe money back on a federal student grant or have made satisfactory arrangements to repay it.
- will not use the Federal Student Aid System to obtain more than one school for the same year.

I, the student, agree to the terms outlined above. Agree Disagree

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address []

FSA ID Password []

After signing and submitting your changes, please let us know that you successfully used the IRS Data Retrieval Tool.

- If you still have your Institutional Verification Document, please indicate that you used IRS DRT on the form.
- If you already mailed your form to our office, please call us to advise at **570-484-2424**.