

HELP SHEET – USING THE IRS DATA RETRIEVAL TOOL



The following help sheet is intended to guide you through the process of updating your FAFSA using the IRS Data Retrieval Tool. These instructions assume that you have been able to successfully log into the FAFSA and complete the first four steps in the process (Student Demographics, School Selection, Dependency Status, and Parent Demographics, if applicable.)

1. On the “Financial Information” tab, select “Already completed” from the drop-down list.

Student Tax Filing Status

Student Demographics School Selection Dependency Status Parent Demographics Parent Financials Student Financials Sign & Submit Confirmation

STUDENT INFORMATION

Application was successfully saved.

Because the FAFSA belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

Attention! You must provide financial information from your **2018 tax return** on the following pages.

For 2018, have you completed your IRS income tax return or another tax return?

Already completed

What income tax return did you file for 2018?

Select

For 2018, what is your tax filing status according to your tax return?

Select

PREVIOUS NEXT

2. Read and answer the questions that will help determine if you qualify to use the tool. The questions will pertain to your tax return type and tax filing status for 2018.

3. Click the “Link to IRS” button to go to the IRS website and transfer your current tax information directly to your FAFSA.

Student Tax Filing Status

Student Demographics School Selection Dependency Status Parent Demographics Parent Financials Student Financials Sign & Submit Confirmation

STUDENT INFORMATION

Application was successfully saved.

Because the FAFSA belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

Attention! You must provide financial information from your **2018 tax return** on the following pages.

For 2018, have you completed your IRS income tax return or another tax return?

Already completed

What income tax return did you file for 2018?

IRS 1040

For 2018, what is your tax filing status according to your tax return?

Married-Filed Joint Return

IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT):

LINK TO IRS

PREVIOUS NEXT

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4. Read the next screen and select “Proceed to IRS Site.”

A screenshot of the "Student Leaving FAFSA" screen. At the top, a progress bar shows steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Parent Financials, Student Financials, Sign & Submit, and Confirmation. The "Student Financials" step is currently active. Below the progress bar, a "STUDENT INFORMATION" box contains text explaining the process of leaving FAFSA on the Web and transferring tax information. At the bottom of this box are two buttons: "SKIP IRS DRT" and "PROCEED TO IRS SITE". A red arrow points to the "PROCEED TO IRS SITE" button. At the bottom of the page, there is a footer with the text "Site Last Updated: Sunday, September 29, 2019", "Download Adobe Reader", and "©2010 fafsa.gov. All rights reserved."

5. A warning message will pop up for the second time, notifying you that you are leaving the FAFSA website. Say “OK” to proceed.

6. The link should open the IRS.gov website. Fill in the appropriate information (some of it will be pre-populated for you) and click “Submit.” Note that the address must match your Federal Income Tax Return in order to retrieve your information.

A screenshot of the IRS Data Retrieval Tool (DRT) form. The form includes several fields: "Married-Filed Joint Return" (dropdown), "Street Address" (text field with a note "Must match your 2018 Federal Income Tax Return"), "P.O. Box" (text field with a note "Required if entered on your tax return"), "Apartment Number" (text field with a note "Required if entered on your tax return"), "Country" (dropdown, currently "United States"), "City, Town or Post Office" (text field), "State / U. S. Territory" (dropdown, currently "Select One"), and "ZIP Code" (text field). Below the form is a disclaimer: "By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties." At the bottom are two buttons: "SUBMIT" and "CANCEL". A red arrow points to the "SUBMIT" button.

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7. If you entered your information exactly as it appears on your 2018 taxes, your income tax information will be located. Review the information that may be transferred from the list provided and select “Transfer My Tax Information into the FAFSA Form” checkbox. Then click “Transfer Now.”

8. The relevant Income Tax Information will be transferred from the IRS to your FAFSA. Those fields will all say, “Transferred from the IRS” but will not display actual values. **DO NOT CHANGE THE TRANSFERRED DATA.**

9. For dependent students, repeat this process for your parents’ tax information.

Once you have transferred tax information from the IRS to your FAFSA **DO NOT CHANGE ANY OF THE TRANSFERRED DATA ELEMENTS.** We can only accept tax information from the IRS that is unchanged as accurate documentation of your current tax data. If you feel the information you transferred is inaccurate, contact the Office of Student Financial Aid for further instructions.