Using the IRS Data Retrieval Tool:

The Data Retrieval Tool (DRT) is a fast, convenient and accurate way to transfer answers from your tax return directly to your FAFSA. To be sure that you are eligible to use the DRT, go to https://studentaid.gov/help-center/answers/article/what-is-irs-drt

1. Go to https://studentaid.gov/h/apply-for-aid/fafsa and click Login on the right. Be sure to use the **student's information.**

2. Enter the student's FSA ID and click Next.

Parents: click the option to "enter the student's information" (name, SSN, date of birth) and then, when prompted on the second screen, enter the SAVE KEY your child created.
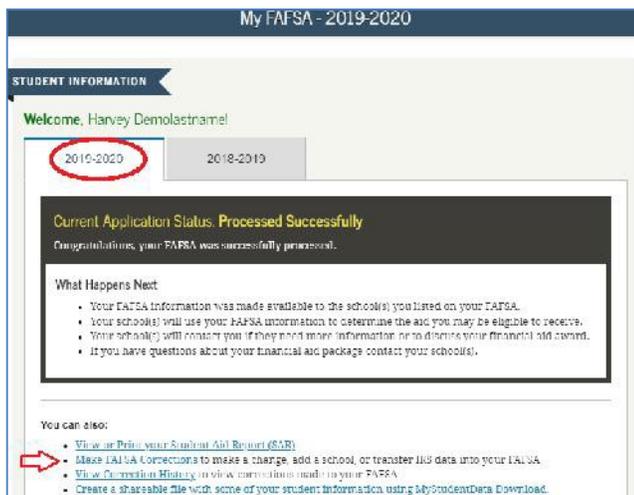
3. Click on the appropriate **aid year tab** (ex. 2022- 2023 for 2022-23 Academic Year, 2023-2024 for 2023-24 Academic Year) and click on Make FAFSA Corrections in the lower left

4. On the next screen (sample not shown) you will create a **Save Key** (similar to a password), click Next and on the next screen (Intro Page – also not shown) click Next again. This **Save Key** can be used so that your parent can log in at a later time (using your SSN and birthdate) without knowing your FSA ID.

5. Click on the Financial Information tab near the top of the screen. The initial screen is Parent Tax Information (see below). **If you are unable to skip** to this section, you must scroll to the bottom of each screen and click "Next".

If you are updating only student information, scroll to the bottom and click Next. Follow the same/similar steps whether updating parent or student information.

6. For the first question ("…have you completed your income tax return…") select "Already Completed."

7. Based on your answers to the next questions, you *may* be given the option to link to the IRS. Provide any required information then click "Link to IRS."

8. After providing the FSA ID and "Next" button, you will be advised that you are leaving FAFSA on the Web. Click "OK." (screenshot not provided)

9. Provide details for the tax filer on the screen "Get My Federal Income Tax Information" exactly as it appears on the return you/your parent filed.

Ex: if the street address on your tax return is "1234 South Main Street" do not enter "1234 S. Main St" on this screen. Click "Submit".

If you receive an error message **"We are unable to provide you with your Federal Income Tax information"** after you click submit button:

a. Print, save or take a picture of the IRS.gov error page

b. Attach it to the IRS Data Retrieval Request Form

2017 Federal Income Tax Information

10. If your answers match what is on file at the IRS, the next screen (left) shows which answers will be transferred from IRS records to the FAFSA. You will not see values.

Check the box for Transfer My Tax Information (circled left) and click Transfer Now (circled left) and these answers will be populated within the FAFSA.

11. You will return to the FAFSA website, and will see confirmation that IRS tax information was transferred. For security reasons, you will not see the actual values transferred, but the words "**Transferred from the IRS**"

12. For many, you will need to enter (separate) values for "income from work" earned by each parent. Which can be found on your (parent) W-2 form.

Over the next five screens (may be more or less) enter other **parent** values as needed. Do not leave blank.

If you are making corrections to your **original FAFSA,** you will see your original answers to questions about savings, investments, business/farm. Correct them only if they were *incorrect* the first time you submitted the FAFSA. Do not update answers to reflect changes that have taken place since then.

13. After seeing/answering the parental asset questions, click "Next" and you will see "Student Financial Information" (sample not shown). Answer all questions about the student's income (use the same Data Retrieval Tool process in Steps 6-12 above). If the student didn't file a return or is not ready to use the DRT, go to Step 14.

14. If you are making corrections to your **original FAFSA,** you will have the option to **List of Changes** or a summary of your entire application. We recommend that you print/save both.

15. Continue to the "Sign & Submit" tab (upper right). Follow all instructions carefully (screenshot left) to include signatures for both **student** and **parent.**

It is important to not mix the student / parent FSA IDs.

Note that there are options to submit a signature, other than an electronic signature (FSA username and password). They will take longer to process, so they are not normally recommended.

Once any intended signature is provided, click Submit My FAFSA Now.

16. **VERY IMPORTANT:** the process has been completed only if you see this Confirmation Page (left).

Print or save the confirmation page for your records. It may be needed if the federal student aid processing center cannot locate your FAFSA at a later time.