

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>

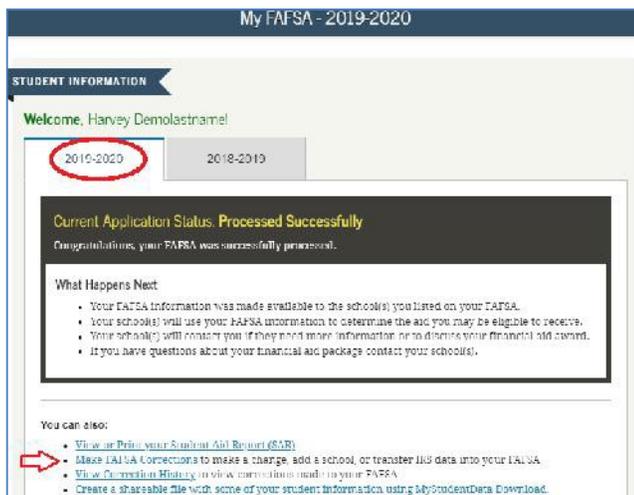


1. Go to <https://studentaid.gov/h/apply-for-aid/fafsa> and click **Login** on the right. Be sure to use the **student's information**.



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.

The screenshot shows the 'Parent Tax Filing Status' screen. At the top, there are tabs for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'Financial Information' tab is active. Below the tabs, there is a progress bar with green checkmarks for the first four tabs and a blue checkmark for 'Financial Information'. The main content area is titled 'PARENT INFORMATION' and contains a question: 'For 2017, have your parents completed their IRS income tax return or another tax return?'. A dropdown menu is open, showing options: 'Already completed', 'Will file', and 'Not going to file'. The 'Already completed' option is selected. At the bottom right, there are 'PREVIOUS' and 'NEXT' buttons.

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

This screenshot shows the same 'Parent Tax Filing Status' screen, but with more questions. The first question is answered 'Already completed'. The second question is: 'For 2017, what is your parents' tax filing status according to their tax return?'. A dropdown menu is open, showing 'Married Filing Joint Return'. The third question is: 'Did your parents file a Puerto Rican or foreign tax return for 2017?'. Radio buttons for 'Yes' and 'No' are present, with 'No' selected. Below the questions is an 'IRS Data Retrieval Tool' section with a 'LINK TO IRS' button circled in red.

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)

The screenshot shows the 'Get My Federal Income Tax Information' screen. It asks for personal information to retrieve tax return data. Fields include: First Name (Mark), Last Name (Jones), Social Security Number (***-**-0611), Date of Birth (9 / 15 / 1964), and Filing Status (Married Filing Joint Return). The 'Address' section has a note: 'Must match your 2017 Federal Income Tax Return'. Fields for Street Address, P.O. Box, Apt. Number, Country (United States), City, Town or Post Office, State / U.S. Territory, and ZIP Code are present. Red arrows point to the Street Address, City, and State fields. At the bottom, there are 'Return to FAFSA' and 'Submit' buttons, with the 'Submit' button circled in red.

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

Check

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT. Therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is listed in the items listed below as you reported to the IRS:

Tax Year (Name(s))	Type of Return Filed	Unearned Income	Unearned Pension
Social Security Number	Adjusted Gross Income	Income Earned from Work	Tax-exempt Interest Income
Filing Status	Income Tax	Education Credits	IRA Contributions and Payments
IRS Processing			Student or Parental Return Received

Refer to your tax records if you have a question about the values you reported.

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

Transfer My tax information into the FAFSA form

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

Do Not Transfer My tax information and Return to the FAFSA Form

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 form.

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.

Parent IRS Info

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

You have successfully transferred 2017 IRS tax information.

The parents' 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." For your protection, IRS tax return information is not displayed on the FAFSA.

What type of income tax return did your parents file for 2017?
Transferred from the IRS

What was your parents' adjusted gross income for 2017?
Transferred from the IRS

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**"

Parent Income from Work

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

How much did your Parent 1 (father/mother/sepparent) earn from working (wages, salaries, tips, etc.) in 2017?
\$.00

How much did your Parent 2 (father/mother/sepparent) earn from working (wages, salaries, tips, etc.) in 2017?
\$.00

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.