

How to Use the IRS Data Retrieval Tool on the FAFSA

The IRS Data Retrieval Tool (IRS DRT) allows students and parents who filed a U.S tax return with the Internal Revenue Service (IRS) to access the IRS tax return information needed to complete the *Free Application for Federal Student Aid* (FAFSA®) form and to transfer the data directly into their FAFSA form.

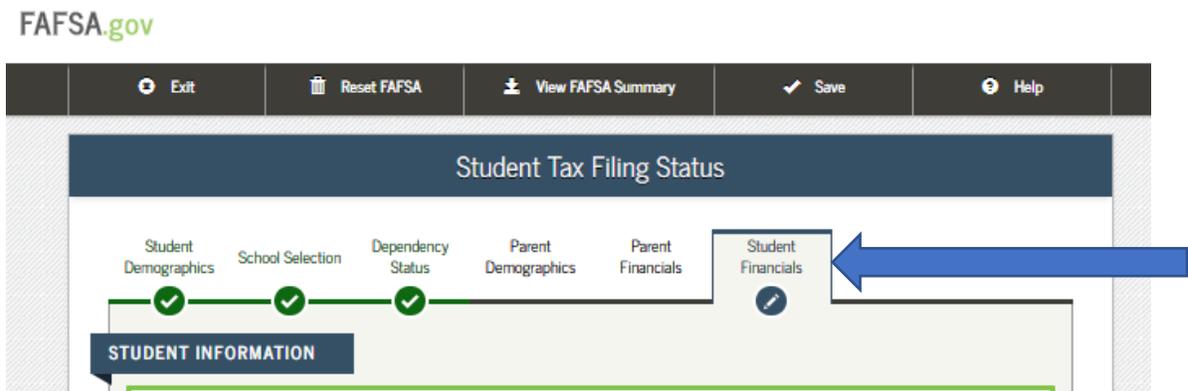
Visit studentaid.gov to learn more about the Data Retrieval Tool and FAFSA.

Go to <https://studentaid.gov/h/apply-for-aid/fafsa>

Select **Start Here** for new users or

Log In as a returning user

Use the following steps at the Parent Financials and Student Financials tab:



Answer the required 3 questions about your tax return and then select the “**Link to IRS**” icon.

The screenshot shows the IRS Data Retrieval Tool (DRT) interface. It contains three questions with dropdown menus for answers:

- For 2018, have you completed your IRS income tax return or another tax return?
- What income tax return did you file for 2018?
- For 2018, what is your tax filing status according to your tax return?

Below the questions is a dark blue header for "IRS Data Retrieval Tool". Underneath, it says: "Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT):". A prominent blue button labeled "LINK TO IRS" with a right-pointing arrow is centered below this text. At the bottom right, there are "PREVIOUS" and "NEXT" buttons. The footer includes the text: "Site Last Updated: Sunday, December 13, 2019", "Download Adobe Reader", and "©2010 fafsa.gov. All rights reserved."

You will be notified that you are leaving FAFSA on the Web in order to use the IRS Data Retrieval Tool:

Click **“Proceed to IRS Site”**

You are now leaving this page. Click **OK** to continue to the IRS Data Retrieval Tool website:

Click **OK**



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THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY! Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

OK

Enter your name and address exactly as it appears on the Tax Return:



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Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2018 Federal Income Tax Return. ?

All fields are required unless marked otherwise.

First Name

Last Name

Click **Submit**

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.

SUBMIT

Select the button below to exit the IRS system and return to your FAFSA.

CANCEL

Check the box to Transfer My Information into the FAFSA form.

Then click **Transfer Now**.

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2018 Federal Income Tax Information

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 limited to the items listed below as you reported to the IRS:

Tax Year	Type of Return Filed	Untaxed Portion of IRA Distributions & Pensions/Annuities
Name(s)	Adjusted Gross Income	Tax-exempt Interest Income
Social Security Number	Income Earned from Work	IRA Deductions and Payments
Filing Status	Income Tax	Status of Amended Returns Received
IRS Exemptions	Education Credits	

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

Transfer My Tax Information into the FAFSA Form

The tax information provided to fafsa.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. **TRANSFER NOW**

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. **DO NOT TRANSFER**

For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see **"Transferred from the IRS"** in the appropriate fields.

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

STUDENT INFORMATION

You have successfully transferred your 2018 IRS tax information.

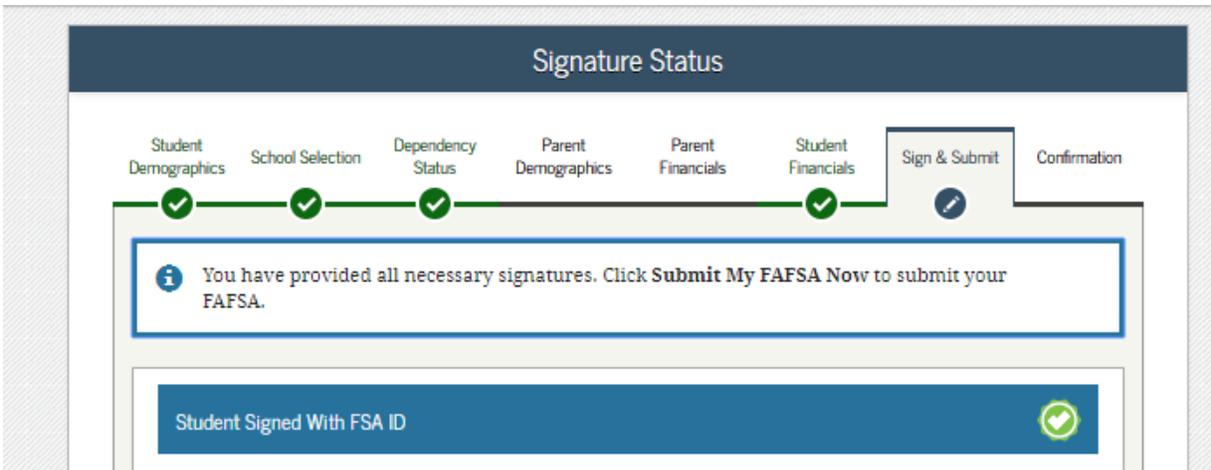
Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS." For your protection, IRS tax return information is not displayed on the FAFSA.

What was your adjusted gross income for 2018?

Transferred from the IRS

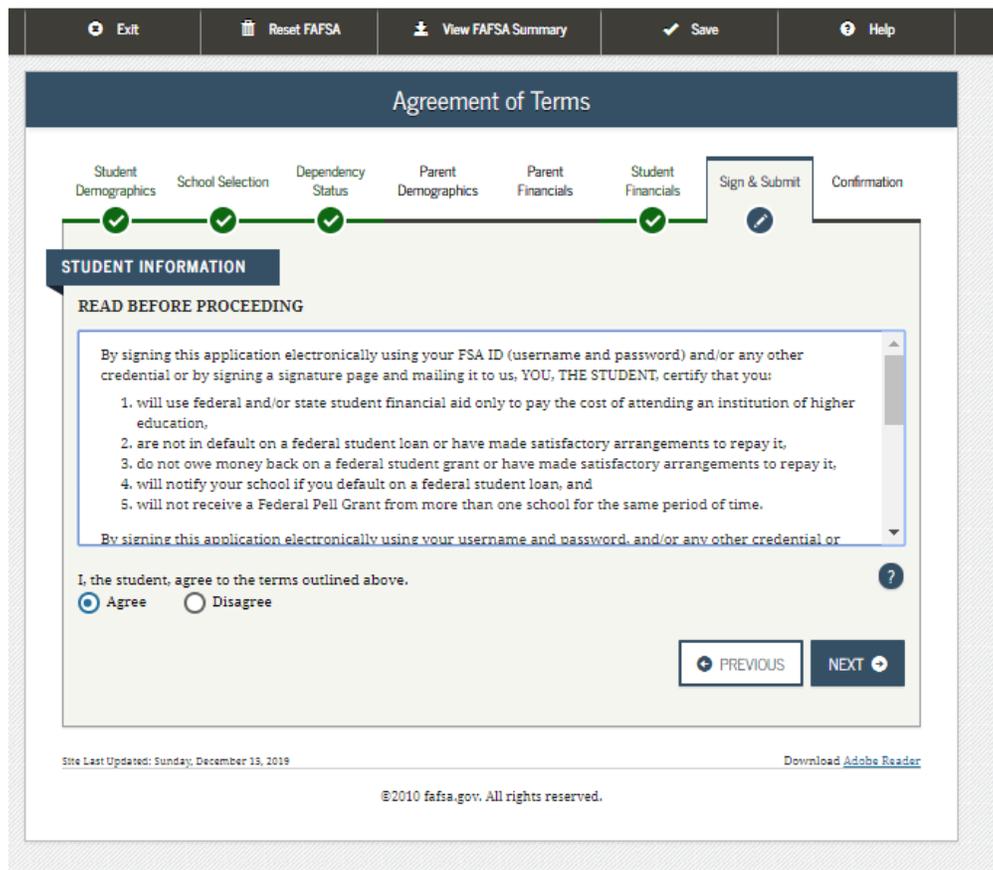
PREVIOUS **NEXT**

Complete the IRS Data Retrieval Tool process by submitting your FAFSA on the **Sign & Submit** tab:



Read the Agreement of Terms and **click Agree**.

Then click **NEXT**



Repeat this process for the Parent signature (if required) and then click **Submit My FAFSA Now**.

