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:

FAFSA.gov							
⊖ Exit	mi R	eset FAFSA	± View FAFS	SA Summary	🗸 Save	😌 Help	
Student Demographi	School Selection	Dependency Status	Student Tax F Parent Demographics	Filing Statu Parent Financials	JS Student Financials		

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

What income tax return did	i you file for 2018?		
For 2018, what is your tax fi	lling status according to your tax retur	m?	
🖭 IPS Data Patriava	Tool		
Applying is faster and east Tool (IRS DRT):	sier if you transfer your tax return inf	formation into this FAFSA with the I	RS Data Retriev
Applying is faster and east Tool (IRS DRT)!	sier if you transfer your tax return inf	formation into this FAFSA with the I	IRS Data Retriev
Applying is faster and eas Tool (IRS DRT):	sier if you transfer your tax return inf	formation into this FAFSA with the I	IRS Data Retriev

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"

		Student Leav	ving FAFS/	A			
Student Schoo	I Selection Dependency Status	Parent Demographics	Parent Financials	Student Financials	Sign & Submit	Confirmation	
STUDENT INFORMA	TION						
	Leaving FAFSA on the	e Web					
	You have entered answ responses and replace your IRS tax informati	vers to one or mor them with inform on into this FAFSA	e income ques ation containe	stions <i>. FAFSA on</i> ed in your tax re	<i>the Web</i> will delete turn when you tra	e these nsfer	
	You are now leaving FAFSA on the Web and will be transferred to the IRS Web site to access your IRS tax information. Your FAFSA information will be saved.						
	Your saved FAFSA will or choose to return to information or choose log in to open your sav	automatically ope FAFSA on the Web not to return to F red FAFSA.	en either when from the IRS V AFSA on the W	n you transfer yo Web site. If you d Teb from the IRS	ur information fro lo not transfer you Web site, you will l	om the IRS ir have to	
	For your protection, y the FAFSA.	your tax return i	nformation w	ill not display o	on the IRS Web sit	e or on	
			SK	IP IRS DRT 🗐	PROCEED TO IRS	SITE 🔿	
Site Last Updated: Sunday, De	cember 15, 2019				Downloa	ad <u>Adobe Reader</u>	
		©2010 fafsa.gov. Al	l rights reserved	i.			

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

	Leaving I	AFSA on the Web						
	You have entered answers to one or more income questions. <i>FAFSA on the Web</i> will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA.							
	You are now leaving <i>FAFSA on the Web</i> and will be transferred to the IRS Web site to access your IRS tax information. Your FAFSA information will be saved.							
	Your save or choose informati log in to o For you the FAF	d FAFSA will automatically open either when you transfer yo to return to FAFSA on the Web from the IRS Web site. If you on or choose not to return to FAFSA on the Web from the IRS pen your saved FAFSA. You are now leaving this page. Click "OK" to continue or click "Cancel" to stay on this page. Your FAFSA information will be saved if you choose to continue. OK CANCEL	our information from the IR do not transfer your Web site, you will have to n the IRS Web site or on PROCEED TO IRS SITE					
Last Updated: Sunday, Dec	ember 13, 2019		Download <u>Adobe R</u>					
		©2010 fafsa.gov. All rights reserved.						

Click OK



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

Logout 🕞 Españ

Click Submit

કા					
Select the but	on below to exit ti	he IRS system and i	eturn to your FAFSA.		
CA	NCEL				

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

Then click **Transfer Now**.

ä	IRS		Return to FAFSA Help Logout 🚱 Español
	2018 Federal Incom	e Tax Information	
	Based on the information you provided, the In below, the IRS will securely transfer your tax questions. For your protection, the IRS will not display you DRT; therefore, ED is unable to display your t	Iternal Revenue Service (IRS) located your inc information to the U.S. Department of Educatio our tax information and will further encrypt any ax information on your FAFSA form.	ome tax return. With your permission on (ED) to populate any applicable FAFSA [®] tax information transferred using the IRS
	The data retrieved from your tax return is limit	ted to the items listed below as you reported to	the IRS:
	Tax Year	Type of Return Filed	Untaxed Portion of IRA Distributions &
	Name(s)	Adjusted Gross Income	Pensions/Annuities
	Social Security Number	Income Earned from Work	Tax-exempt Interest Income
	Filing Status	Income Tax	IRA Deductions and Payments
	IRS Exemptions	Education Credits	Status of Amended Returns Received
	Refer to your tax records if you have a questi Transfer My Tax Information into the FAFS	on about the values you reported. A Form (?)	
	The tax information provided to fafsa.gov wi appropriate FAFSA questions. After the FAF your IRS session will end, and you will retur this box if you are choosing to transfer your	II populate the answers to the SA questions are populated, n to your FAFSA form. Check information.	TRANSFER NOW (?)
	Do Not Transfer My Tax Information and R	eturn to the FAFSA Form 🍞	
	By clicking the "Do Not Transfer" button, you your tax information electronically. Your IRS return to your FAFSA form.	are choosing not to transfer session will end, and you will	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.

Stude Demogra	ent Sc aphics	:hool Selection	Dependency Status	Parent Demographics	Parent Financials	Student Financials	Sign & Submit	Confirmation
STUDEN	T INFORI	MATION				•		
0	You ha Your IF were p your pr	Ne successful S tax inform opulated wit rotection, IRS	ully transfer ation has bee h tax informs S tax return in	red your 2018 i en successfully ation will be ma aformation is n	IRS tax inform transferred in arked with "Tr ot displayed o	mation. nto this FAFSA. ransferred fror on the FAFSA.	Questions that n the IRS." For	
What what w	was your a ferred fro	adjusted gross m the IRS	income for 20	18?				?
						4	PREVIOUS	NEXT 📀

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

Signature Status						
Student School Selection	Dependency Parent Parent Status Demographics Financials	Student Financials Sign & Submit Confirmation				
FAFSA.	necessary signatures. Click Submit M	iy FAFSA Now to submit your				

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

Then click NEXT

Student Sch	nool Selection Dependency Status	Agreement of Terms Parent Parent Demographics Financials	s	
Student Sch	nool Selection Dependency Status	Parent Parent Demographics Financials		
	-O-O-O-	Demographics Financials	Student Sign & Subr	nit Confirmation
DENT INFORM	-00-		Financials	Commission
DENT INFORM				
	IATION			
AD BEFORE	PROCEEDING			
By signing this credential or b	s application electronical	ly using your FSA ID (username)	and password) and/or any oth STUDENT, certify that your	ier 🗍
1. will use f	federal and/or state stude	nt financial aid only to pay the c	cost of attending an institution	of higher
education	n,			
2. are not in	n default on a federal stu	dent loan or have made satisfact	tory arrangements to repay it,	
4. will notif	fy your school if you defa	ult on a federal student loan, and	d	epay n,
5. will not r				
	receive a Federal Pell Gra	nt from more than one school fo	or the same period of time.	
By signing this	receive a Federal Pell Gra s application electronical	nt from more than one school fo lv using vour username and pase	or the same period of time. sword. and/or any other crede	ential or 🔻
By signing this	receive a Federal Pell Gra s application electronical	nt from more than one school fo Iv using vour username and pas:	or the same period of time. sword. and/or any other crede	ential or
Bv signing this he student, agr	receive a Federal Pell Gra s application electronical ree to the terms outlined a Disagree	nt from more than one school fo lv using your username and bas; above.	or the same period of time. sword. and/or any other crede	ential or 🗸
By signing this he student, agr Agree	receive a Federal Pell Gra s application electronical ee to the terms outlined a Disagree	nt from more than one school fo ly using your username and pass above.	or the same period of time. sword. and/or any other creds	ential or 🔻
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By signing this he student, agr Agree	receive a Federal Pell Gra s application electronical ree to the terms outlined a Disagree	nt from more than one school fo ly using your username and pas: above.	or the same period of time. sword. and/or any other crede PREVIOUS	ential or ? NEXT •
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student, agr	receive a Federal Pell Gra s application electronical ree to the terms outlined a Disagree	nt from more than one school fo ly using your username and pass above.	or the same period of time. sword. and/or any other crede	ential or

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

Signature Status: Signed Electronically		
	PREVIOUS	SUBMIT MY FAFSA NOW 오