

## IRS Data Retrieval Tool

We strongly recommend that students and parents use the IRS Data Retrieval Tool when completing their FAFSA. This tool allows tax filers to transfer their IRS tax return information directly from the IRS onto their FAFSA. Using this option will expedite the processing of your financial aid application and ensure accurate information is reported.

Students and parents who are eligible to use the IRS Data Retrieval Tool (IRS DRT) can access it from within the *Free Application for Federal Student Aid (FAFSA)* on the student or parent finances pages:

1. Click “**Link To IRS**”. (**Note:** If you have already used the IRS DRT to transfer your tax return information into your application, click the "View option to link to the IRS" hyperlink.)
2. Enter your FSA ID. (**Note:** The person whose tax information is being transferred should enter his or her own FSA ID. Students will not be asked to enter their FSA ID if they entered an FSA ID to begin their FAFSA.)
3. Your FAFSA will be saved and you will be transferred to the IRS website.
4. On the IRS website, enter the requested information exactly as it appears on your tax return. If you get an error that there's no match, double check your information, including the exact mailing address on your return.
5. Once authenticated with the IRS, you will be provided with information surrounding your IRS tax information. You can either transfer your information from the IRS, or choose to return to *FAFSA on the Web*.

If you use the IRS DRT to transfer your tax return information from the IRS, the information will not display on your FAFSA. For your protection, the answer to each question is replaced with "Transferred from the IRS."

The IRS DRT allows you to securely transfer original IRS tax return information, but not Form 1040X amended tax return information. If you filed a Form 1040X amended tax return, please upload a signed copy of your IRS 1040 Form or Tax Return Transcript and a signed copy of your 1040X.

# IRS Data Retrieval Option for 2020-21 FAFSA

We strongly recommend that parents and students select the IRS Data Retrieval Tool option when filing the FAFSA. This option will streamline and expedite the processing of your financial aid application.

## **IRS Data Retrieval Tool Instructions**

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. To use the Data Retrieval Tool, complete the following steps:

- Go to <https://studentaid.ed.gov/sa/fafsa> and select the “Log In” button
- Log in using your FSA ID
- Select the “Continue” or “Make a Correction” button
- Select the “Financial Information” tab from the top of the page

### **Instructions for the parent to request the parent IRS Information:**

1. Go to “Parent Financial Information” tab
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool (if you are **not** eligible to use the tool, you must submit your 2018 Tax Return Transcript to our office.)
3. If eligible, select which parent is providing information on the FAFSA
4. Enter the FSA ID for the parent providing the information
5. Click “Link to IRS”
6. 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 on your FAFSA, the IRS DRT web page, and on the Student Aid Report.
7. Proceed to the Sign and Submit page

### **Instructions for the student to request the student IRS Information:**

1. Go to “Student Financial Information” tab
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool (if you are **not** eligible to use the tool, you must submit your 2018 Tax Return Transcript to our office, see page 2 for instructions)
3. If eligible, click “Link to IRS”
4. 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 on the FAFSA, the IRS DRT web page, and on the Student Aid Report.
5. Proceed to the Sign and Submit page