

How to...?

Use the IRS Data Retrieval Tool

Tax filers can transfer their tax information directly from the IRS to the FAFSA by using the IRS Data Retrieval Tool (DRT). We strongly encourage you to use this process to save both you and your college/university time in processing your financial aid application.

Basic requirements to be eligible to use the IRS DRT are:

- ✓ Completed and filed taxes
- ✓ Tax filing status must be married filing jointly, single, head of household, or qualifying widower
- ✓ Must answer "No" to the following questions
 - Did you file a form 1040X amended tax return?
 - Did you file a Puerto Rican or foreign tax return?
 - Did you file electronically in the last 3 weeks (or by mail in the last 11 weeks)?
- ✓ Marital status did not change after end of tax year.

Steps to use the IRS Data Retrieval Tool

1. Go to fafsa.gov and complete your initial FAFSA or select **Make FAFSA Correction** option after you login.
2. The link to the IRS DRT is available on the **Financial Information** tab for both student and/or parent. Indicate taxes are already completed and your tax filing status, then answer the three questions (see above) and the IRS DRT icon will appear. [LINK TO IRS](#)
3. If requested, enter the FSA ID for the appropriate person (student or parent) then click on the **Link to the IRS** box.
4. You will get a warning box indicating you are leaving the FAFSA. Click "**OK**" to continue. You will then see a second warning when IRS website appears. Click "**OK**" to continue.
5. When you are on the IRS web page, you will need to confirm your demographic information and enter your address. Accuracy of this information is vitally important and must match what was on the filed tax return.
6. If the data entered matches, the web page will show you the information pulled from your tax return that will be added to your FAFSA.

NOTE: You must complete both items below:

- ✓ Click the box under **Transfer My Tax Information** into the FAFSA **AND**
- ✓ Click the "**Transfer Now**" button to complete this process!

7. Once you complete the transfer process you will automatically be redirected to your FAFSA on the web and will see the header **Transferred from the IRS** next to each data item that was transferred.

NOTE: Do NOT adjust any data element with this tag or you nullify the benefits of transferring the data directly from the IRS!

8. Continue with any additional updates or corrections needed to submit your FAFSA, then sign and submit the application using the appropriate FSA ID's.

NOTE: In a two parent household, list each income separately.

9. Once submitted you will always see a confirmation page. If you do not see this then you have not submitted your FAFSA!

Contact INvestED with any questions!

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