

2018-2019 IRS Data Retrieval Tool (DRT)

What is the IRS Data Retrieval Tool?

The IRS Data Retrieval Tool allows a student (and their parents, if dependent) to retrieve financial information necessary to complete the 2018-2019 FAFSA directly from the IRS.

Why use the IRS Data Retrieval Tool?

By using the IRS Data Retrieval:

- Most financial information questions on the application are answered by importing information
- Financial Information reported on the FAFSA is accurate
- If selected for a process called verification, copies of tax return transcripts will **not** be required

Who is eligible to use the IRS Data Retrieval Tool?

In order to be eligible to use the 2018-2019 IRS Data Retrieval Tool, an individual (student or parent) must:

- Have completed a tax return for the 2016 tax year
- **Not** file taxes as "Married Filing Separately" or "Head of Household"
- **Not** have filed an amended tax return
- **Not** have filed a Puerto Rican or foreign tax return

Eligible individuals will be prompted to provide their FSA ID and password. Then select "Link To IRS" to begin using the tool.

The screenshot displays the IRS Data Retrieval Tool (DRT) interface for a student. The page is titled "Student Tax Information" and features a navigation menu at the top with tabs for "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Financial Information" tab is currently selected. The main content area includes a "Help" icon, a search bar, and a "LINK TO IRS" button. A "Help and Hints" sidebar on the right provides additional information, including a note about Puerto Rican or foreign tax returns and a link to "Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.?". The page also includes a "STUDENT" sidebar on the left and a footer with "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT" buttons.

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How do I use the IRS Data Retrieval Tool

After being determined to be eligible to use the IRS Data Retrieval Tool, the applicant will notified they are being transferred to the IRS website and to select "Proceed to IRS Site" to continue.

The screenshot shows the top navigation bar with tabs for Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. A vertical 'STUDENT' label is on the left. The main content area displays a message: 'Leaving FAFSA on the Web. 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 automatically open either when you transfer your information from the IRS or choose to return to FAFSA on the Web from the IRS Web site. If you do not transfer your information or choose not to return to FAFSA on the Web from the IRS Web site, you will have to log in to open your saved FAFSA. For your protection, your tax return information will not display on the IRS Web site or on the FAFSA. Click Proceed to IRS Site to continue. Otherwise, click Skip IRS Transfer. If you have any questions or problems using this tool, view available Help options for assistance.' At the bottom are two buttons: 'SKIP IRS TRANSFER' and 'PROCEED TO IRS SITE'.



[Return to FAFSA](#) | [Log Out](#) | [Help](#)

[Español](#)

Get My Federal Income Tax Information

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

Enter the following information from your 2016 Federal Income Tax Return. [?](#) Required fields *

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	*** - ** - <input type="text"/>
Date of Birth *	<input type="text"/> / <input type="text"/> / <input type="text"/>
Filing Status *	Select One <input type="text"/>
Address - Must match your 2016 Federal Income Tax Return. ?	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <input type="text"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One <input type="text"/>
ZIP Code *	<input type="text"/>

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

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.

[Return to FAFSA](#)

[Submit](#)

[IRS Privacy Policy](#)

Provide the following demographic information:

- Filing Status
- Address including City, State, Country and Zip Code (Note: This information must match what appears on the completed tax return.)

If the tax filer has moved since completing taxes, use the address listed on the tax return.

Select "Submit" to process



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Review the financial information then check the box labeled "Transfer My Tax Information into the FAFSA" and select "Transfer now."

2016 Federal Income Tax Information

Patrick Lahale

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 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.

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 Pensions
Name(s)	Adjusted Gross Income	Untaxed IRA Distributions
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 question about the values you reported.

[Print this page for your records before choosing an option below.](#)

Transfer My Tax Information into the FAFSA

The tax information provided to FOTW will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information. [Transfer Now](#)

Do Not Transfer My Tax Information and Return to the FAFSA

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. [Do Not Transfer](#)

[IRS Privacy Policy](#)

The applicant will be notified upon success and returned to the FAFSA

Application was successfully saved.

You're almost done. You transferred your IRS tax information, and questions that were populated are marked with "Transferred from the IRS." To finish, you must sign and submit this application and receive a confirmation page.

If the attempt is not successful the Tool will notify the applicant

The address you entered does not match our records.

What went wrong?

- Your address may have changed. Your current address may not be the same as the address we have on record for you. Use the address that matches your 2012 Federal Income Tax Return. Dont forget to include your apartment number if applicable.

Financial Information transferred from the IRS will include "Transferred from the IRS" next to the amount. Parents and students may **NOT** edit the imported amounts from the IRS to ensure information is not changed.

STUDENT

Student Financial Information

i You have successfully transferred your 2016 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 income tax return did you file for 2016?
Transferred from the IRS

What was your adjusted gross income for 2016?
Transferred from the IRS

How much did you earn from working (wages, salaries, tips, etc.) in 2016?
Transferred from the IRS

As of today, are you a dislocated worker?
No

[PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Help and Hints

Is Student or Spouse a Dislocated Worker Question 102

In general, a person may be considered a dislocated worker if he or she:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- has been laid off or received a lay-off notice from a job;
- was self-employed but is now unemployed due to economic conditions or natural disaster;
- is the spouse of an active duty member of the Armed Forces and has experienced a loss of employment because of

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