

2019-20 IRS Data Retrieval Tool Directions

The IRS Data Retrieval Tool allows certain applicants to transfer information directly from the IRS' database into the FAFSA which reduces time, effort, and data entry for FAFSA applicants and/or their parents (if applicable). However, those with tax filing status of Married Filing Separately, Married Filing Head of Household, parents whose marital status is "unmarried and both parents living together", those who filed Puerto Rican or foreign tax return or had a change in marital status since January 1, 2018 are not eligible to use the IRS Data Retrieval Tool and will need to enter their tax return information manually. The IRS DRT allows you to securely transfer original IRS tax return information, but not Form 1040X Amended U.S. Individual Income Tax Return information. If you filed an amended tax return 1040X, please contact the financial aid office for further guidance.

1. Log into FAFSA at <https://studentaid.ed.gov/sa/fafsa>
2. Select "Login"
3. Enter FSA ID username and password for student and select "Next"
 - If a FSA ID has not been created, please select create an FSA ID username and password
4. Select "Make FAFSA Correction" (bottom left) and select "Next"
5. Enter Save Key or create a Save Key and select "Next"
6. Select the "Financial Information" section from the menu bar at the top of the page
7. You will be asked if you have completed your 2017 IRS Income Tax Return
 - You must be able to select "Already Completed" to continue
8. You will be asked the following question: Did you (or your parents) file a Puerto Rican or foreign tax return for 2017? You must be able to answer No to this question to proceed.
9. If eligible, click "Link to the IRS". Enter the either the Student, Parent 1, or Parent 2 FSA ID username and password as needed
 - You will receive a prompt stating that you are now leaving FAFSA on the Web
10. Select "OK"
 - You will receive a prompt stating that you are now using and entering a Government website
11. Select "OK"
12. Review the prefilled information and make sure that the first name, last name, social security number and date of birth are correct
 - Select the appropriate filing status
 - Enter the address EXACTLY as it is shown on your tax return (word for word, abbreviation for abbreviation, case sensitive)
13. Select "Submit"
14. You will now see a summary page of the information that will be transferred into the FAFSA
 - Scroll to the bottom of the page
 - Check the box to the left of the "Transfer Data to FAFSA" option
 - Select "Transfer Now"
15. You will receive notification that the data has been successfully transferred and will be directed back to the FAFSA
16. If necessary, complete the same steps to transfer the student tax data.
17. Select the "Sign and Submit" section from the menu bar at the top of the page
 - Sign the FAFSA with the appropriate FSA ID and submit the correction for processing