<u>Using the IRS Data Retrieval Tool (IRS DRT)</u>

How to link your IRS tax return information directly to your FAFSA

If your FAFSA was selected for verification review by the Department of Education, the Financial Aid Office is required to verify your tax information that was reported on your FAFSA. To meet verification requirements, families can either:

- **Transfer the tax information directly to the FAFSA using the IRS Data Retrieval Tool** (<u>best option</u>)
  or
- Submit a copy of the IRS Tax Return Transcript (obtained from the IRS, not a personal copy of the return itself)

> **If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using it for several reasons:**
> It's the easiest way to provide your tax data, it's the best way of ensuring that your FAFSA has accurate tax information and you won't need to provide a copy of your tax return transcript.

Step 1: Go to www.fafsa.gov and "Login".

Step 2: Enter your FSA Username and Password and click "next".

Step 3: Choose "Make FAFSA Corrections". "next".

Step 4: Choose "next" and create a "save key" and click "next".

Step 5: Follow the prompts to transfer your tax return information. The screenshot below is in the student section of the FAFSA.

Step 6: If you are eligible to use the IRS Data Retrieval Tool, you can now click on "ok" to access the IRS site.

Step 7: Click "ok".

Step 8: Enter the requested information. The address must match the address listed on the tax return.

Step 9: Review the information. Check the box to "Transfer my tax information into the FAFSA" and choose "transfer now".

Step 10: Once your information has been transferred, do not update any responses that say "Transferred from the IRS". Answer the additional questions and click "next".

Please Note: If you are using the IRS Data Retrieval Tool for both the student and parent, you will need to repeat this step for the parent under the Parent Financial Information section before submitting the updated FAFSA.

Step 11: Continue to the "Sign and Submit" tab. Follow instructions carefully and make sure that all required persons sign using the FSA ID.

Step 12: Let us know you successfully used the IRS DRT

After signing and submitting your changes, **please let us know** that you successfully used the IRS Data Retrieval Tool.

- If you still have your Institutional Verification Document, please indicate that you used IRS DRT on the form.
- If you already mailed your form to our office, please call us to advise at **570-484-2424.**