

2021-2022 | FINANCIAL AID

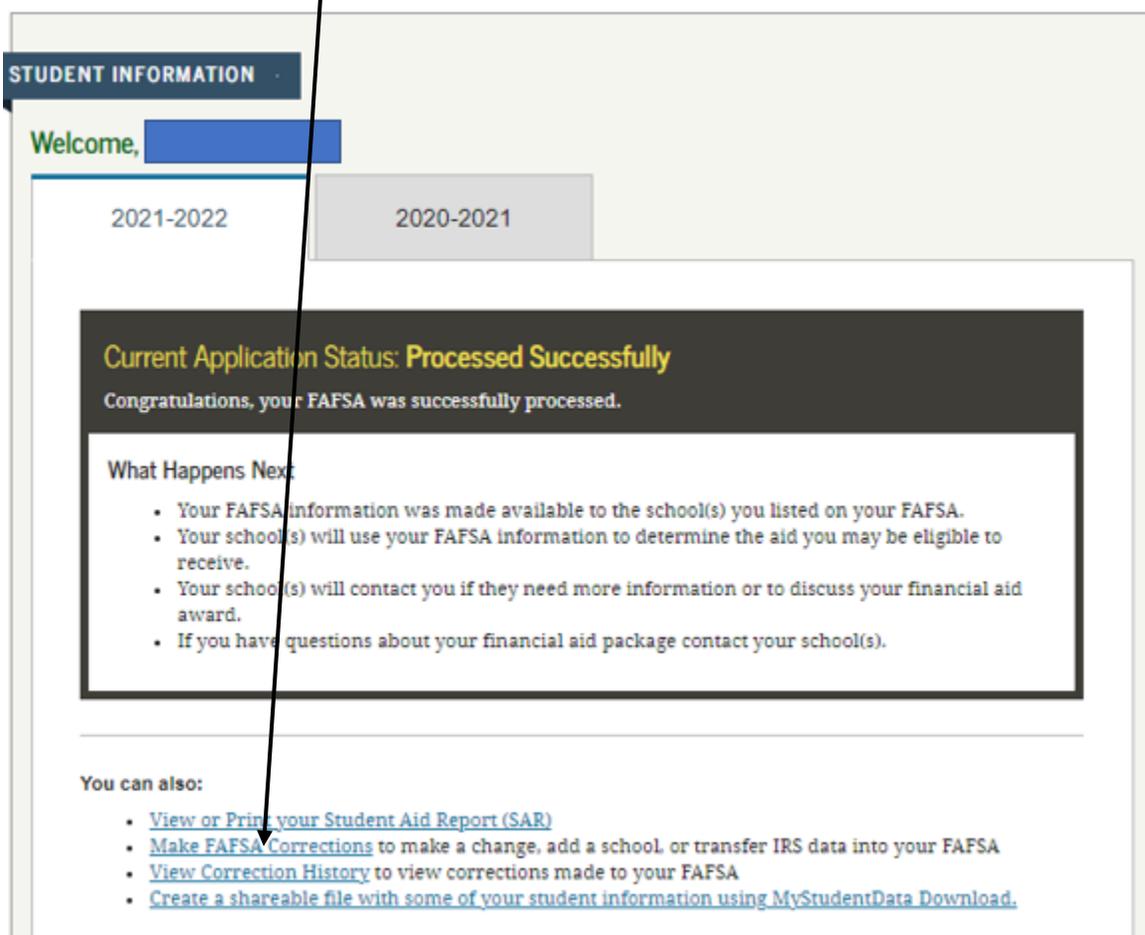
The IRS Data Retrieval Tool (DRT) is a tool designed to allow both you as the student and your parent(s) to transfer the information that was filed with the IRS back into your FAFSA application. In order to make sure this is a successful process, you must know the EXACT address that was used to file the tax return.

Step 1: Go to <https://studentaid.gov/h/apply-for-aid/fafsa>

Step 2: You will either click 'Start Here' or 'Log In' depending on if you are a new or returning user.

Step 3: Enter your FSA ID username and password.

Step 4: Click "Make FAFSA Corrections."



The screenshot shows the FAFSA application status page. At the top, there is a 'STUDENT INFORMATION' tab. Below it, a 'Welcome,' message is partially visible. Two tabs for the academic years '2021-2022' and '2020-2021' are shown. The main content area features a dark banner with the text 'Current Application Status: Processed Successfully' and 'Congratulations, your FAFSA was successfully processed.' Below this, a section titled 'What Happens Next' contains a bulleted list of instructions. At the bottom, a 'You can also:' section provides links for viewing the Student Aid Report (SAR), making corrections, viewing correction history, and downloading student information.

STUDENT INFORMATION

Welcome, [REDACTED]

2021-2022 2020-2021

Current Application Status: Processed Successfully
Congratulations, your FAFSA was successfully processed.

What Happens Next

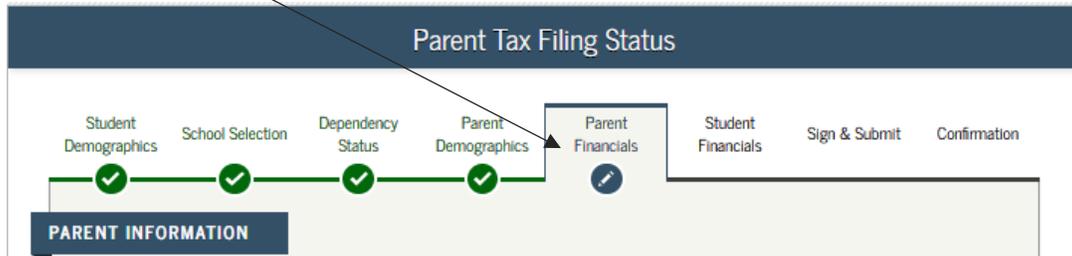
- Your FAFSA information was made available to the school(s) you listed on your FAFSA.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA
- [View Correction History](#) to view corrections made to your FAFSA
- [Create a shareable file with some of your student information using MyStudentData Download.](#)

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Step 5: Click on the "Parent Financials" tab.



Step 6: Once you have answered the three questions below, you will see on the next page the box that will appear to determine whether you can transfer your information from the IRS website. NOTE: This is your 2019 Federal Tax Return (Not 2020).

Parent Tax Filing Status

Student Demographics School Selection Dependency Status Parent Demographics **Parent Financials** Student Financials Sign & Submit Confirmation

PARENT INFORMATION

Application was successfully saved.

Attention! You must provide financial information from your parents' 2019 tax return on the following pages.

For 2019, have your parents completed their IRS income tax return or another tax return? ?
Already completed

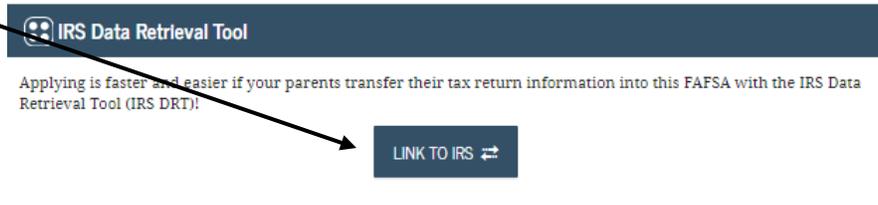
What type of income tax return did your parents file for 2019? ?
IRS 1040

For 2019, what is your parents' tax filing status according to their tax return? ?
Select

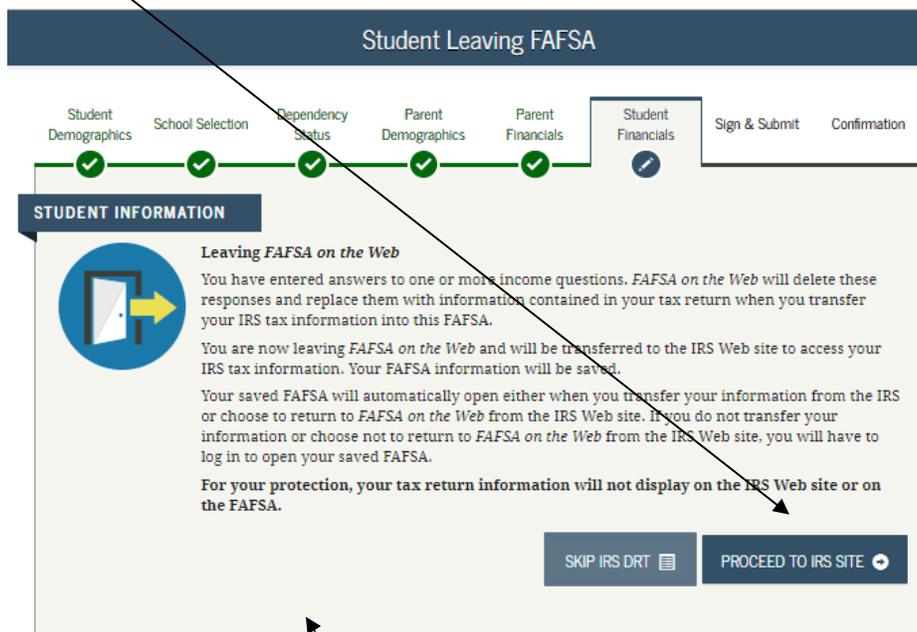
PREVIOUS NEXT

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Step 7: If you are eligible to transfer your information, you will see the message on your screen, click "Link to IRS" blue box.



Step 8: The next screen you will see is indicating that you are leaving FAFSA on the web and going to the IRS website. Click the "Proceed to IRS Site" button.



Step 9: You will receive a pop up message like the one below, click OK.

You are now leaving this page. Click "OK" to continue or click "Cancel" to stay on this page. Your FAFSA information will be saved if you choose to continue.



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Step 10: You are then taken to the IRS website. After reviewing the box that pops up, click "OK".

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY! Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431)

OK

Step 11: The information that will be populated for you will be your name, last four of your Social Security Number, date of birth, and filing status you reported on the FAFSA.

Get My Federal Income Tax Information

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

Enter the following information from your 2019 Federal Income Tax Return. ?

All fields are required unless marked otherwise.

First Name

Last Name

Social Security Number

No input required

Date of Birth

MM/DD/YYYY



Filing Status ?

Married-Filed Joint Return

Step 12: Enter the **EXACT** address you used on your 2019 taxes.

Street Address ?

Must match your 2019 Federal Income Tax Return

P.O. Box ?

Required if entered on your tax return

Apartment Number

Required if entered on your tax return

Country

United States

City, Town or Post Office

State / U.S. Territory

Select One

ZIP Code

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.

SUBMIT

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Step 13: Once you have entered the information above, click "Submit."

If the information matches the IRS records, you will see the screen below. If the information does not match you will need to review and fix the information as needed.

2019 Federal Income Tax Information

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 U.S. 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 form.

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 Portion of IRA Distributions & Pensions/Annuities
Name(s)	Adjusted Gross Income	Tax-exempt Interest Income
Social Security Number	Income Earned from Work	IRA Deductions and Payments
Filing Status	Income Tax	Status of Amended Returns Received
IRS Exemptions	Education Credits	Schedule 1 Evaluation

Refer to your tax records if you have a question about the values you reported.

Transfer My Tax Information into the FAFSA Form ?

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.

TRANSFER NOW ?

Do Not Transfer My Tax Information and Return to the FAFSA Form ?

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 form.

DO NOT TRANSFER ?

Step 14: Select the option "Transfer My Tax Information into the FAFSA." Then select the "Transfer Now" button located on the right side.

Step 15: You will be redirected back to the FAFSA application where your tax information is now filled in. You will know that it was a successful transfer when you see the box below on your screen.

The screenshot shows a progress bar at the top with steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Parent Financials, Student Financials, Sign & Submit, and Confirmation. The first five steps have green checkmarks, and Student Financials has a blue pencil icon. Below the progress bar is a blue box labeled "STUDENT INFORMATION" containing a green checkmark and the text: "You have successfully transferred your 2019 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."

Step 16: Click next on the bottom of the page and answer any remaining questions you are asked for you as the student. Then if you are required to provide parental information on the FAFSA go back to step 4 and proceed with the remaining steps to transfer parent tax information.