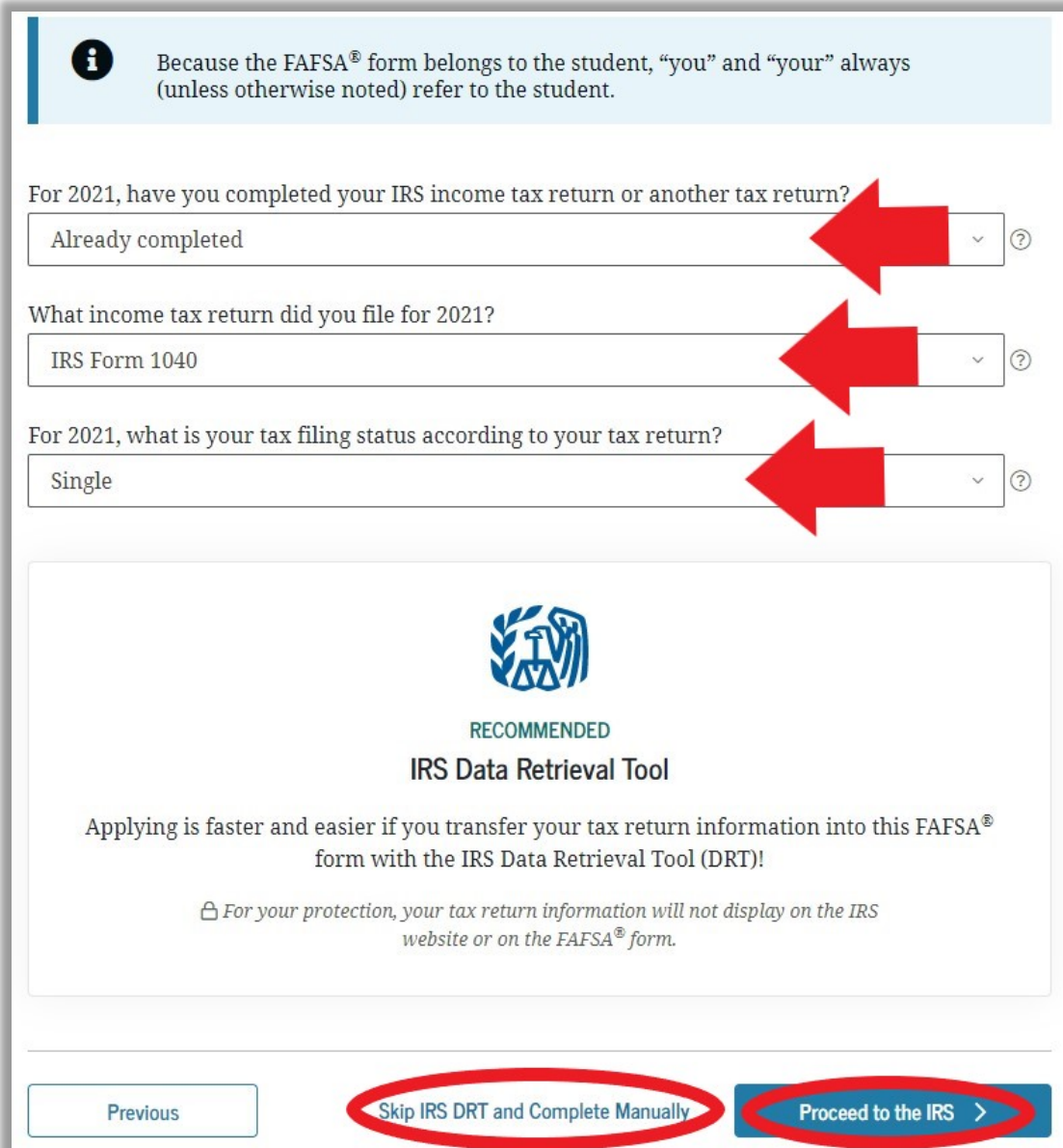


Guide for using the IRS DRT on the 2023-2024 FAFSA

The **IRS Data Retrieval Tool** (IRS DRT) allows students and parents who filed a U.S. tax return with the Internal Revenue Service (IRS) to access the IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA®) and to transfer the data directly into their FAFSA application.

Not everyone will be able to use this process due to a variety of different reasons. You may need to manually enter the tax information on your FAFSA.



i Because the FAFSA® form belongs to the student, “you” and “your” always (unless otherwise noted) refer to the student.

For 2021, have you completed your IRS income tax return or another tax return?
Already completed

What income tax return did you file for 2021?
IRS Form 1040

For 2021, what is your tax filing status according to your tax return?
Single

RECOMMENDED
IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA® form with the IRS Data Retrieval Tool (DRT)!

For your protection, your tax return information will not display on the IRS website or on the FAFSA® form.

Previous **Skip IRS DRT and Complete Manually** **Proceed to the IRS >**

On the FAFSA you should be in the “Financials” section of the FAFSA, enter the tax filing information and click on “Proceed to the IRS.”

Guide for using the IRS DRT on the 2023-2024 FAFSA

STUDENT INFORMATION

Student Leaving Your FAFSA® Form

You have entered answers to one or more income questions. Your FAFSA form will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA form.

You are now leaving your FAFSA form and will be transferred to the IRS website to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA form will automatically open either when you transfer your information from the IRS or choose to return to your FAFSA form from the IRS website. If you do not transfer your information or choose not to return to your FAFSA form from the IRS website, you will have to log in to open your saved FAFSA form.

[Skip IRS DRT and Complete Manually](#) [Proceed to the IRS](#)

A popup will ask you if you want to leave the page. Click “OK” to go to the IRS website and continue the process.

[Close X](#)

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

[Cancel](#) [OK](#)

 [Return to FAFSA](#) | [Help](#) | [Logout](#) | [Español](#)

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](#)

Guide for using the IRS DRT on the 2023-2024 FAFSA



The screenshot shows the IRS DRT interface for entering 2021 Federal Income Tax Return information. The form includes the following fields and instructions:

- First Name**: A text input field with a red arrow pointing to it.
- Last Name**: A text input field with a red arrow pointing to it.
- Social Security Number**: A text input field with the instruction "No input required" and a red arrow pointing to it.
- Date of Birth**: A date input field with the format "MM/DD/YYYY" and a calendar icon, with a red arrow pointing to it.
- Filing Status**: A dropdown menu with "Single" selected and a red arrow pointing to it.
- Street Address**: A text input field with the instruction "Must match your 2021 Federal Income Tax Return" and a red arrow pointing to it.

At the top of the form, there is a header with the IRS logo and navigation links: "Return to FAFSA", "Help", "Logout", and "Español". The main heading is "Get My Federal Income Tax Information" with a sub-heading: "See our Privacy Notice regarding our request for your personal information." Below the heading, it says "Enter the following information from your 2021 Federal Income Tax Return." and "All fields are required unless marked otherwise."

Some of the information will already be filled in. You need to make sure that everything matches the information on your 2021 federal tax return. This includes all capitalization, spaces, and abbreviations in the address. If you do not have a PO Box or Apartment number leave those spaces blank.

Guide for using the IRS DRT on the 2023-2024 FAFSA

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
52240

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

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

CANCEL

IRS | IRS Privacy Policy | Accessibility

Once everything is filled in correctly, click on “SUBMIT.”

Guide for using the IRS DRT on the 2023-2024 FAFSA

The screenshot shows the IRS DRT interface for 2021 Federal Income Tax Information. At the top, there is a blue header with the IRS logo and navigation links: "Return to FAFSA", "Help", "Logout", and "Español". The main heading is "2021 Federal Income Tax Information". Below this, there is a paragraph explaining that the IRS has located the user's tax return and will securely transfer it to the U.S. Department of Education (ED) to populate FAFSA questions. It also states that the IRS will not display the tax information and will further encrypt it using the IRS DRT, so ED is unable to display it on the FAFSA form. A list of data items transferred is provided:

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

Below the table, there is a note: "Refer to your tax records if you have a question about the values you reported." There are two main sections for user selection:

Transfer My Tax Information into the FAFSA Form (with a help icon):

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 (with a help icon)

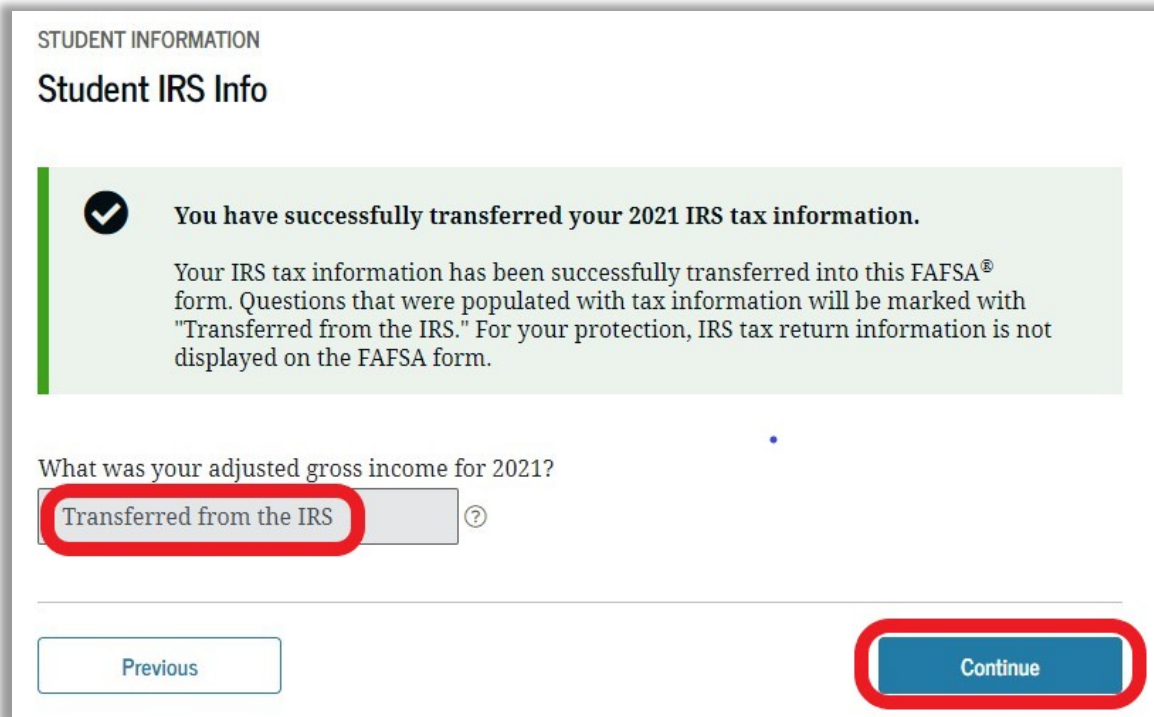
Do Not Transfer My Tax Information and Return to the FAFSA Form (with a help icon):

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 (with a help icon)

If the IRS tax data is located and can be transferred, you will see the screen shown above. Check the first box and then click the “TRANSFER NOW” button next to it.

Guide for using the IRS DRT on the 2023-2024 FAFSA



STUDENT INFORMATION

Student IRS Info

You have successfully transferred your 2021 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA® form. 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 form.

What was your adjusted gross income for 2021?

Transferred from the IRS ?

[Previous](#) [Continue](#)

Do not close the tab or your browser. It may take a minute or two for the process to work. Once the transfer is complete, it should take you to the page that asks, “What was your adjusted gross income for 2021?” Directly below that question should say, “Transferred from the IRS.” You can then click on “Continue” to complete the rest of your FAFSA.

Limited information is transferred using the IRS DRT process. You may still need to provide tax data such as Income earned from work.