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.
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 be notified they are being transferred to the IRS website and to select “Proceed to IRS Site” to continue.

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.”

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

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.