

# Using the IRS Data Retrieval Tool (DRT) to [LINK TO IRS](#)

Go to [www.fafsa.gov](http://www.fafsa.gov), access your 2020-2021 FAFSA, and **make a correction** on the **Financial Information** section.

The following step-by-step instructions illustrate how to use the IRS Data Retrieval Tool (DRT) to link tax information to a student's FAFSA. Please note the following directions are for the parent(s)' financial information. If the student wishes to link his or her tax information, the option will be available after the parent's financial data is completed. If the student is independent for FAFSA purposes, only student financial data will display, and the student will be given the option to "Link to IRS," similar to the instructions below.

## 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 mother's 2018 tax return on the following pages.

For 2018, has your mother completed her IRS income tax return or another tax return?

?

Already completed

What type of income tax return did your mother file for 2018?

?

IRS 1040

For 2018, what is your mother's tax filing status according to her tax return?

?

Head of Household

⚙ IRS Data Retrieval Tool

Applying is faster and easier if your mother transfers her tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

LINK TO IRS ⇄

PREVIOUS

NEXT

1

## Parent Log In to IRS DRT

Student  
Demographics

School Selection

Dependency Status

Parent  
Demographics

Financial  
Information

Sign & Submit

Confirmation

### PARENT INFORMATION

You, the parent, should enter the information below and click Next to continue. Other parents click Skip IRS DRT.

If you have any questions or problems using this tool, click [FAFSA Help](#) for assistance.

Parent's FSA ID Username or Verified E-mail Address

[Forgot Username](#) | [Create an FSA ID](#)

Parent's FSA ID Password

[Forgot Password](#)

If your parent does not have a FSA ID, create one.

Enter the Parent's FSA ID to proceed to IRS SITE  
(This is where you link to IRS)

 SKIP IRS DRT

NEXT 

## Student Leaving FAFSA

Student  
Demographics

School Selection

Dependency Status

Parent  
Demographics

Financial  
Information

Sign & Submit

Confirmation



### Leaving FAFSA on the Web

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site. Your FAFSA information will be saved.

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

For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.

 SKIP IRS DRT

PROCEED TO IRS SITE 

-- (Continued on page 3) --

Please note, you **MUST** use **2018 income tax data** on the **2020-2021 FAFSA**. You may not use 2019 income tax data. If you believe your financial situation has changed significantly from the 2018 tax year, please contact the Financial Aid office regarding a professional judgement appeal.

1. Click **LINK TO IRS** (see screenshot on opposite page).
2. Your FAFSA will be saved, and you will be transferred to the IRS web site. You (or your parent) may need to re-enter the FSA ID of the person whose taxes you are trying to link.
  - a. If you are trying to link **the parent's taxes**, enter the **parent's FSA ID**.
  - b. If you are trying to link **your (the student's) taxes**, enter **your FSA ID**, if prompted.
3. Click **"Proceed to IRS Site"**.
4. On the IRS web site, **enter the requested information exactly as it appears on your tax return.** (Hint: may need to format address as on [www.usps.com](http://www.usps.com) → [look up a zip code](#))
5. Once the IRS has validated your identification, your IRS tax information will display.
6. To transfer, check **"transfer"** on the lower left of the screen and click **"Transfer Now"** on the right side of the screen. This will take you back to your FAFSA.
7. If you transfer your IRS tax information, questions that are populated with tax information will be marked with **"Transferred from the IRS."** **Do not change any of these items!**
8. When all tax information for individuals who filed has been transferred, proceed to the signature page of the FAFSA to sign and submit.

**IMPORTANT!!!** As indicated previously, data transferred with the DRT is identified on the FAFSA and changing the transferred information could result in the need to provide the school with a copy of a tax transcript.

### **REPORTING EARNINGS:**

Income from work (wages) populates with the IRS DRT for individuals who file their taxes as *Single*, *Head of Household*, or *Qualifying Widower*. For joint filers a total amount for wages transfers from the IRS, and the amounts need to be divided if there are two (2) wage earners. When the amount is entered for the first wage earner, the difference will populate for the second wage earner.

- **Do not leave "income from work" blank.** Enter **-0-** if there is no income from work to report for any parent or student whose information is provided on the FAFSA.

Answer the question about earnings/income from work (wages, salaries, tips, etc.) whether or not a tax return was filed. This information may be on the W-2 forms, or on IRS Form 1040—lines 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); on 1040A—line 7; or on 1040EZ—line 1. **If any individual earning item is negative** (such as amounts on line 12 or 18 from Schedule C, Schedule C-EZ or Schedule F,) do not include that item in your calculation.

### **SIGNING THE FAFSA CORRECTION**

The student and parent of dependent students are required to sign a corrected FAFSA. If the parent and / or student do not have a *username and password* to sign electronically, a FAFSA signature page can be printed and mailed to the address provided on that form.

If unable to use the IRS Data Retrieval, refer to instructions for [OBTAINING A TAX RETURN TRANSCRIPT](#) to order a paper copy if needed to complete verification.

**\*\*Effective 4/26/15**, students and parents will use an FSA ID in lieu of the FAFSA PIN. The FSA ID will be comprised of a user-selected username and password. The change is being made to eliminate the need for individuals to enter personal identifiers (social security numbers, name and date of birth) when accessing Federal Student Aid systems. This change is critical to comply with new security requirements and industry best practices.