IRS Data Retrieval Tool Instructions

In order to use the IRS Data Retrieval Tool within the FAFSA to report your official tax information, the student and/or parent must have already filed taxes. Individuals who filed as “Married filing separately,” those who are married and filed as “Head of household,” those who filed an amended tax return, and those who filed a Puerto Rican or foreign tax return are not eligible to use DRT. If none of these apply to you, please follow the steps outlined below for the fastest and easiest way to provide filed tax information to our office.

Step 1 – Assuming that you have already filed your 2012-2013 FAFSA, navigate to it at http://www.fafsa.ed.gov and click “Start Here.” Then, begin the Login process by providing the requested Student Information.
Step 2 – Select “Make FAFSA Corrections.” Again, this assumes the 2012-2013 FAFSA has already been filed.
Step 3 - Login using your FAFSA PIN and password. Note that the student and parent have separate PIN’s and passwords and will need to enter the FAFSA separately to perform the IRS Data Retrieval for their own respective filed tax records.
Step 4 - Navigate to the “Financial Information” section at the top.
Step 5 - Answer the two tax questions. Only those who accurately respond “Already completed” and “None of the above” are eligible to use the IRS DRT. If you are able to use the IRS DRT, your screen will appear as below and you will be presented with the option to reenter your FAFSA “PIN” and “Link to the IRS.”
Step 6 - You will be reminded that you are Leaving FAFSA on the Web to go to the IRS site to transfer your income tax information. Click “OK.”
Step 7 – Once in the IRS site, some of your personal information data will be populated from the FAFSA, and you will need to enter the other requested data, including your “Filing Status” and your “Address” that matches your 2011 federal income tax return exactly. Then, click “Submit.”
Step 8 - If the data transfer was successful, you will be asked to confirm that your tax information is correct and to “Transfer Now” your data from the IRS to FAFSA.
Step 9 - A page will appear letting you know you are leaving the IRS website and returning to your FAFSA. Click “OK.”
Step 10 – You will be returned to the FAFSA site which confirms the successful data transfer. Do not update any fields labeled “Transferred from the IRS.” Reenter your PIN to sign your corrected FAFSA and click “Sign” when you are done. Then, read the acknowledgements, click “Agree” and then “Submit My FAFSA Now” when complete. From there, you will see a Confirmation Page for that you may print your records. If you use DRT successfully, you will not need to obtain a tax return transcript.

Step 11 - As mentioned earlier, this process must be done separately for the parent(s) and student. Therefore, assuming the parents have retrieved their IRS data first, the student must do the same by logging in to the FAFSA with his or her own FAFSA PIN and password and then repeating steps 1 through 10 above.