IRS Data Retrieval Tool (DRT) Instructions

The IRS Data Retrieval Tool (IRS DRT) is available through the Free Application for Federal Student Aid (FAFSA). It is the preferred method to transfer IRS tax information. If required to report parent information on the FAFSA, the IRS DRT should be used to correct/verify both the student and parent(s) tax information.

2021 IRS Income Tax Return
Filed electronically - IRS DRT available within approximately 4 weeks
Filed by mail - IRS DRT available within approximately 8 weeks

To access and sign the FAFSA, you will need:
Student FSA ID
Parent FSA ID (if dependent)

If you do not have an FSA ID, you will be prompted to do so when accessing the FAFSA
Log in at https://studentaid.gov**:**
1. As a **returning** FAFSA filer, select the "Login" button.
2. Log in using the **student's** name, date of birth, and Social Security number and click "Next."
3. Enter the student's FSA ID and password, create a transaction "Save Key" and click "Next."
4. Click on "Make FAFSA Corrections."

Parent IRS DRT (if dependent):
1. Go to "Financial Information" section– parent.
2. Make sure that the status of the tax return is marked as "**Already Completed**."
3. You will be presented with a series of questions to determine whether the parent(s) are eligible for the IRS DRT.
4. If eligible, enter the parent FSA ID and click "Link to IRS" to be transferred to the IRS.
5. Enter the filing status and address information exactly as it appears on your 1040/1040A/1040EZ. Click "Submit."
6. Review the tax information displayed, and check the "Transfer My Tax Information into the FAFSA" box.
7. Click the "Transfer Now" button. You will be redirected back to the FAFSA.

In order to complete the Student IRS DRT answer "No" to the following question in the parent's financial information section: "Do you want to skip the remaining questions about your and your parent's income and assets?"

Student IRS DRT – to be completed if the student filed a tax return
1. Go to "Financial Information" section- student.
2. Make sure that the status of the tax return is marked as "**Already Completed**."
3. You will be presented with a series of questions to determine whether you are eligible for the IRS DRT.
4. If eligible, click "Link to IRS" to be transferred to the IRS.
5. Enter the filing status and address information exactly as it appears on your 1040/1040A/1040EZ. Click "Submit."
6. Review the tax information displayed, and check the "Transfer My Tax Information into the FAFSA" box.
7. Click the "Transfer Now" button. You will be redirected back to the FAFSA.

Sign & Submit:
1. Proceed through the remaining sections of the FAFSA.
2. Enter the student and parent (if dependent) FSA IDs to sign the FAFSA.
3. Mark "Agree" to the Terms of Agreement.
4. Click "Submit My FAFSA Now."
5. If you have successfully submitted the FAFSA, a confirmation page will appear.
6. If you do not receive a confirmation page, verify whether you submitted the FAFSA. In some instances, the student may save the FAFSA without submitting it.