

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

Go to www.fafsa.gov, access your 2023-2024 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.

The screenshot shows the FAFSA application process at the 'Parent Financials' step (step 5). The navigation bar at the top includes: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics (checked), Parent Financials (5), Student Financials (6), and Sign & Submit (7). The main content area is titled 'PARENT INFORMATION' and 'Parent Tax Filing Status'. It contains three dropdown menus: 'For 2021, have your parents completed their IRS income tax return or another tax return?' (set to 'Already completed'), 'What type of income tax return did your parents file for 2021?' (set to 'IRS Form 1040'), and 'For 2021, what is your parents' tax filing status according to their tax return?' (set to 'Married-filed joint return'). Below these is a large white box with the IRS logo and the text: 'RECOMMENDED IRS Data Retrieval Tool. Applying is faster and easier if your parents transfer their 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.' At the bottom, there are three buttons: 'Previous', 'Skip IRS DRT and Complete Manually', and 'Proceed to the IRS >'. A red arrow points to the 'Proceed to the IRS >' button.

[Student Demographics](#) ✓
 [School Selection](#) ✓
 [Dependency Status](#) ✓
 [Parent Demographics](#) ✓
 5 [Parent Financials](#)
 [6](#) [Student Financials](#)
 [7](#) [Sign & Submit](#)

PARENT INFORMATION

Parent Eligible for IRS DRT

Applying is faster and easier with the IRS Data Retrieval Tool (DRT)!

Based on your responses, we recommend that you, the parents, transfer your information from the IRS into this FAFSA form. The [IRS DRT](#) allows you to link to the IRS website and securely transfer original IRS tax return information into the FAFSA form.

If you use the IRS DRT, you may not have to provide additional IRS documentation later for the student to qualify for federal student aid.

[Student Demographics](#) ✓
 [School Selection](#) ✓
 [Dependency Status](#) ✓
 [Parent Demographics](#) ✓
 5 [Parent Financials](#)
 [6](#) [Student Financials](#)
 [7](#) [Sign & Submit](#)

PARENT INFORMATION

Parent Log In to IRS Data Retrieval Tool

i To use the IRS Data Retrieval Tool (DRT), have the parent listed in the FAFSA® form enter his or her credentials below. Otherwise, skip the IRS DRT. If you have any questions or problems using this tool, [view more information about the IRS DRT](#).

Provide parent FSA ID credentials.

Which parent are you? [?](#)

B. Smith (Parent 1)

 C. Smith (Parent 2)

FSA ID Username, Email Address, or Mobile Number [?](#)

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

FSA ID Password [?](#)

[Show](#) [Forgot Password](#)

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

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

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Please note, you **MUST** use **2021 income tax data** on the **2023-2024 FAFSA**. You may not use **2022 income tax data**. If you believe your financial situation has changed significantly from the 2021 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"**.
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 → [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 1 + Schedule 1—lines 3 + 6 + Schedule K-1—Box 14 (Code A). **If any individual earning item is negative**, treat it as a zero 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.