AVILA UNIVERSITY

Financial Aid Office
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2018-2019 IRS Data Retrieval Tool Instructions

Your FAFSA was selected by the federal government for a review process called Verification. As a part of this process, Avila University is required to verify the accuracy of income tax information reported on the FAFSA. Follow the steps outlined below to transfer your 2016 tax information from the IRS directly into your FAFSA. If for any reason you are unable to use the tool, contact the Financial Aid Office immediately for further instruction.

Access the IRS DRT
- On www.fafsa.gov, click the green "Login" button and enter the student's information.
- Select the "Make FAFSA Corrections" hyperlink halfway down the page to log in with the student's FSA ID and password. You will be prompted to create a new Save Key.
- Click the "Financial Information" tab on the gray toolbar near the top of the page.
- Confirm you are in the appropriate section – parent financial information (if required) is first and student financial information is listed on the next page.

Use the IRS DRT
- If appropriate, answer the first question regarding your tax filing as "Already Complete," select the accurate tax filing status, and mark each of the following questions as "No."
    - If you cannot answer "No" to every question, contact the Financial Aid Office at 816.501.3600 to discuss other methods of providing your tax information.
- If prompted, enter the appropriate FSA ID and click the blue "Link to the IRS" button.
    > *This will take you to the IRS website. You will need to complete the form, submit, and review your information before you will have the option to transfer your information back to the FAFSA.*
- Complete information on the IRS form exactly as on your taxes ("Road" vs. "Rd." vs. "Rd") and click "Submit."
- If the IRS DRT is not successful, please review your information and try again.
- If the IRS DRT is successful, review the list of the information that will be transferred, check the box to pull your information to the FAFSA, and select "Transfer Now." When you are returned to the FAFSA website, you should see a "Retrieved from IRS" next to any data that was transferred from the IRS system.

Submit the FAFSA and IRS DRT
- Fill in any additional information, making sure not to change any information that was pulled from the IRS, and select "Next."
- At the end of the Financial Information section, review the corrections you've made. If correct, click the "Next" button again.
- Sign with required FSA ID's and submit.
- Review the information provided on the confirmation page.

Please note: This process may affect your Expected Family Contribution.

> **Your financial aid application cannot be processed until all requested information is received. Failure to complete the verification process in a timely manner may result in the loss of financial aid eligibility.**