

IRS Data Retrieval Tool Instructions

Follow the steps outlined below to transfer your 2021 tax information from the IRS directly into your FAFSA. If for any reason you are unable to use the tool, contact the FAFSA Help Desk for trouble shooting at 1-800-433-3243.

Using the IRS DRT will work for those that have already completed their 2021 taxes, and have filed Single, Married-Joint, or Head of Household. If you have not filed or filed Married-Separate, please complete the income section manually.

In the Parent or Student Tax Info section

- If appropriate, answer the first question regarding your tax filing as “Already Complete,”
- Select the filing status indicated on your 2021 tax return (see italics above)
- Click ‘Proceed to the IRS’
 - A message will come up stating that you are leaving the FAFSA website and a new tab will open to take you to the IRS website
 - After the IRS tab opens, click ok. Portions of your 2021 tax info will be on the following screen.
 - **You should have a hard copy of your 2021 tax return available in order to help you complete the missing information. This is how the IRS will verify your identity.**
- Complete the missing 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.
 - **You will have 3 chances. Once all 3 are used, you will not be eligible to use the DRT and will have to manually enter your tax information in the FAFSA**
- If the IRS DRT is successful, the next step is to click the box next to “Transfer My Tax Information into the FAFSA form” and then click “Transfer Now”

Transfer My Tax Information into the FAFSA Form

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.



TRANSFER NOW



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- On the next screen, click 'Continue' and continue to click 'Continue' for questions that say **"Transferred from the IRS"**

How much did you earn from working (wages, salaries, tips, etc.) in 2020?

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- Some questions will still need to be answered manually

- Review your information when you get to the summary page:

SIGN & SUBMIT

FAFSA[®] Summary

- If you do not need to make corrections, click 'Continue'
- Read the terms and then click the box to agree. Click 'Sign and Submit'. A confirmation page will appear.