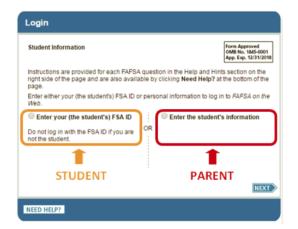# IRS Data Retrieval Tool (DRT) for FAFSA

The IRS Data Retrieval Tool (DRT) allows students and parents to transfer tax return information directly into the FAFSA. This simplifies the Financial Information section and satisfies the "Tax Return Transcript" requirement for students selected for verification by the Department of Education.

TIP: Have a copy of your tax return in front of you when you attempt to use the DRT. Your name and address must be entered EXACTLY as on the return to get a database match.

NOTE: Dependent status for FAFSA is not the same as for the IRS. **Students under 24** must provide parent financial information unless the student can **document** one of the **specific exclusions** the FAFSA asks about, such as if the student is married or an emancipated minor. Information from the FAFSA is used by schools to offer financial aid. Providing financial information on the FAFSA does not obligate the student or the parent to anything.

1) Go to FAFSA.gov

☐ Click on Start a New FAFSA (once per academic year) or Login (to complete a FAFSA in progress or update a previously submitted FAFSA).
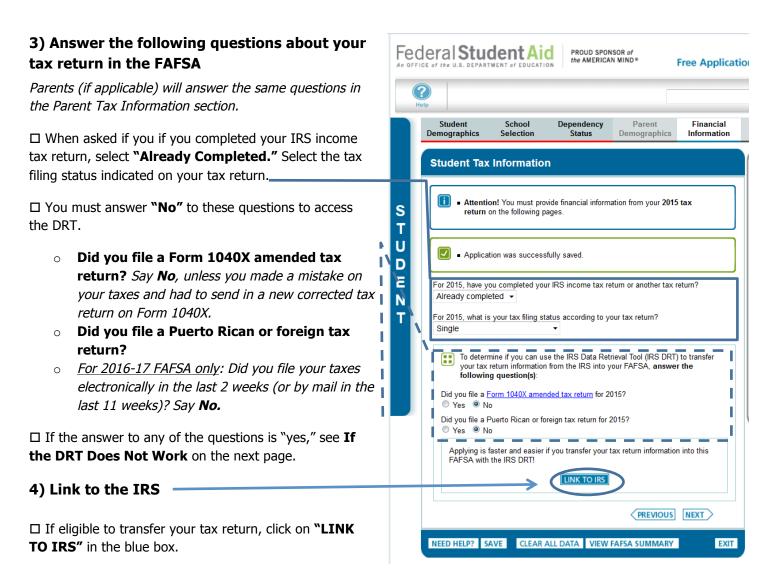

☐ **Student**: Log in on the left-hand side with your FSA ID. (If you don't have an FSA ID, Click on Create an FSA ID).

☐ Create a Save Key (easy, temporary password that allows you or your parent to log back into this particular FAFSA).

☐ *Parent (in a different location from the student):* Log in on the right-hand side. When prompted, enter your student's information and the Save Key created for this FAFSA. Do not log in with your student's FSA ID (considered to be their legal signature) or your own FSA ID (unless you want to apply for financial aid for yourself).

2) Access the DRT under the Financial Information Tab

☐ **New FAFSA (not yet submitted):** You will get to the Financial Information tab after you have answered questions about Student Demographics, School Selection, Dependency Status, and Parent Demographics (for dependent students). ☐ *On the school selection page (right-hand side), enter 002530 and add MSU Billings.*

***Dependent students:** If asked if you **want to skip** questions about parents or yourself, say **"No."** Answer the questions. You may not be able to access the DRT if you skip questions. Your FAFSA may be incomplete.

☐ **Previously Submitted FAFSA:** ☐ Click on the link that says **Make FAFSA Corrections**.
☐ Click on the **Financial Information** tab.

3) Answer the following questions about your tax return in the FAFSA

Parents (if applicable) will answer the same questions in the Parent Tax Information section.

☐ When asked if you if you completed your IRS income tax return, select **"Already Completed."** Select the tax filing status indicated on your tax return.

☐ You must answer **"No"** to these questions to access the DRT.

- o **Did you file a Form 1040X amended tax return?** *Say **No**, unless you made a mistake on your taxes and had to send in a new corrected tax return on Form 1040X.*
- o **Did you file a Puerto Rican or foreign tax return?**
- o *For 2016-17 FAFSA only: Did you file your taxes electronically in the last 2 weeks (or by mail in the last 11 weeks)? Say **No.***

☐ If the answer to any of the questions is "yes," see **If the DRT Does Not Work** on the next page.

4) Link to the IRS

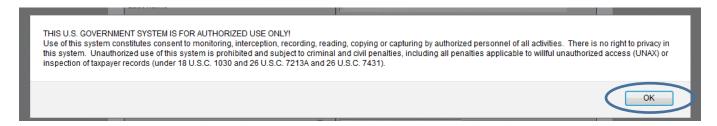☐ If eligible to transfer your tax return, click on **"LINK TO IRS"** in the blue box.

In the Parent Financial Section (if applicable) Parent #1 will be prompted to enter their FSA ID in order to link to the IRS and access the DRT

☐ A window will open that says **"Leaving *FAFSA on the W*eb."** Click on "PROCEED TO IRS SITE."

☐ You will be redirected to IRS.gov. Click **"OK"** to accept the terms of use and access the IRS website.

☐ **Enter your name and address into the IRS form EXACTLY as they appear on your tax return.**

For example, if your return says "Avenue," type "Avenue" and not "Ave." Put a middle initial if you used one for your return. If you moved after you filed your return, use the address you had when you filed.

Tips: For apartments, put the number on the Apt Number line (if indicated by your return). However, if you live in a rural area and used a PO Box for your home address, try entering the PO Box on the Street Address line. Enter the address exactly as it appears on your tax return, even if there is an error.

☐ Click **"Submit."**

5)

Review and Transfer Your Tax Return

☐ Review the information. If correct, check the first box, **"Transfer My Tax Information into the FAFSA."**

☐ Click on **"Transfer Now."** You will be redirected back to FAFSA.gov.

*If you get a **"Something Went Wrong"** screen, return to FAFSA, go back to the previous questions, and try again. Double-check your name and address.*

If the DRT Does Not Work

o   If you are filing a new FAFSA, enter information from your tax return into FAFSA. The FAFSA will indicate which line of the tax return has the correct number to enter. Read the Help and Hints in the right sidebar.

o   if you were attempting to use the DRT to fulfill a verification requirement, see the next page for instructions on how to get an IRS Tax Return Transcript.

If the DRT Is Successful

If the DRT works, your tax information will be transferred automatically to the FAFSA. The FAFSA questions related to your tax return will indicate **"Transferred from the IRS."**

Don't change answers to these questions (except where Individual Retirement Account or pension rollovers are involved). Changing answers will invalidate the information you transferred and could cause you to have to submit additional documentation.

FAFSA

6) Complete the FAFSA

Answer any remaining questions in the FAFSA. If you aren't sure what a question means, read the Help and Hints in the right sidebar.

If asked if you want to skip questions, click "no" and answer the questions. If the answer to a question is zero, type "0." This can help you avoid having to submit additional documentation later on.

7) Sign & Submit the FAFSA

Are you a preparer? **No**. (Preparers are paid money to file FAFSA.)

☐ **Student Signature.** If you logged in with your FSA ID, select Agree and click on SIGN (white and blue box). If you are not logged in, enter your FSA ID to sign FAFSA.
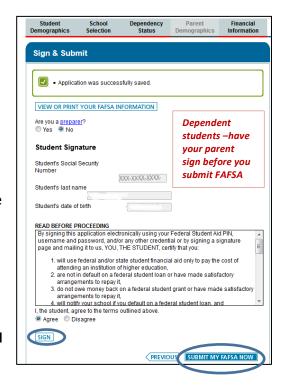
***Dependent students: *If your parent is in another location, wait to submit FAFSA until* under *your parent has signed.*

☐ **Parent Signature.** If prompted, enter your FSA ID. Select Agree and click on SIGN (white and blue box).
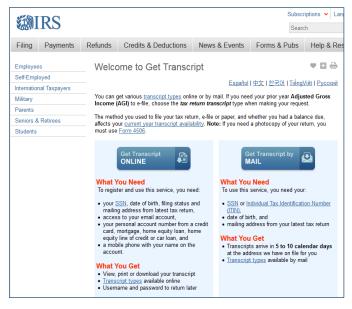
☐ **SUBMIT MY FAFSA NOW** *(After signing FAFSA)*
You will get a confirmation email from the Department of Education if your FAFSA was successfully submitted. Allow at least one week for the Financial Aid office to download your FAFSA.

☐ **Read and respond to letters, emails from the Financial Aid office.** You may need to submit additional documentation in order for the office to process your FAFSA.

IRS Tax Return Transcript

You may not be able to use the IRS Data Retrieval Tool due to one of the following reasons: tax return filing status is 'Married Filing Separately', marital status has changed since December 31, 2015, changes were made to tax questions on the FAFSA after the IRS Data Retrieval has taken place, filed an amended tax return, were granted an extension by the IRS, or filed a Puerto Rican or foreign tax return. If you could not use the IRS Data Retrieval Tool, you will need to provide the Financial Aid office with a **Tax Return Transcript** for the year requested. Go to IRS.gov and look for **Tax Return Transcript**. *TIP: Be sure to request a Tax Return Transcript.* Select **Get Transcript Online** if you can prove your identity with bank or credit card numbers. You won't be charged– it's free. Otherwise, click **Get Transcript by Mail.** You can also call the IRS at **1-800-908-9946**. If you are not eligible to get a transcript by mail, you can fill out **Form 4506-T** and mail it to the IRS. Call the Financial Aid office if you need help with this form. You may be able to get a tax transcript from your local IRS office. Questions? Contact Financial Aid at 406-657-1031 or finaid@rocky.edu