

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 it appears on the tax return to get a database match.

1) Go to fafsa.gov and click on “Start a New FAFSA” (if you have not already filed one) or “Login” (to complete a FAFSA in progress or update a previously submitted FAFSA).

Student: Click on “Enter your (the student’s) FSA ID. (If you don’t have one you can create one.)

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

Parent: Click on “Enter the student’s information”. When prompted, enter your student’s information and the Save Key created for this FAFSA. Do not login with your student’s FSA ID (considered to be their legal signature) or your own FSA ID (unless you want to apply for federal financial aid yourself.

2) Access the DRT under the Financial Information tab

If you are filling out a new FAFSA you will get to the Financial Information tab after you have answered the questions about Student Demographics, School Selection (make sure you enter RMC’s school code 002534), Dependency Status, and Parent Demographics (for dependent students).

If you are accessing a previously submitted FAFSA, first click on the link that says Make FAFSA Corrections, then click on the Financial Information tab.

3) Answer the following questions about your tax return status.

Federal Student Aid
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Free Application for Federal Student Aid
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Help [SEARCH]

Student Demographics | School Selection | Dependency Status | Parent Demographics | Financial Information | Sign & Submit | Confirmation

STUDENT

Student Tax Information

Attention! You must provide financial information from your **2016 tax return** on the following pages.

For 2016, have you completed your IRS income tax return or another tax return?
Already completed ▾

For 2016, what is your tax filing status according to your tax return?
Single ▾

Did you file a Puerto Rican or foreign tax return for 2016?
 Yes No

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

LINK TO IRS

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints

Did you file a Puerto Rican or foreign tax return?

If you filed a Puerto Rican or foreign tax return, select **Yes**; otherwise, select **No**.

You are not eligible to use the [IRS Data Retrieval Tool](#) if you filed a Puerto Rican or foreign tax return.

Related Topics:

[Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.?](#)

When asked if you completed your IRS income tax return, select “Already Completed”.

You must answer “No” to “Did you file a Puerto Rican or foreign tax return”.

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

4) Link to the IRS

If eligible to transfer your tax return, click on “Link to the IRS”. In the Parent Tax Information (if applicable) the parent will be prompted to enter their FSA ID in order to link to the IRS and access the DRT.

Leaving FAFSA on the Web

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.

For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.

Click **Proceed to IRS Site** to continue. Otherwise, click **Skip IRS Transfer**.

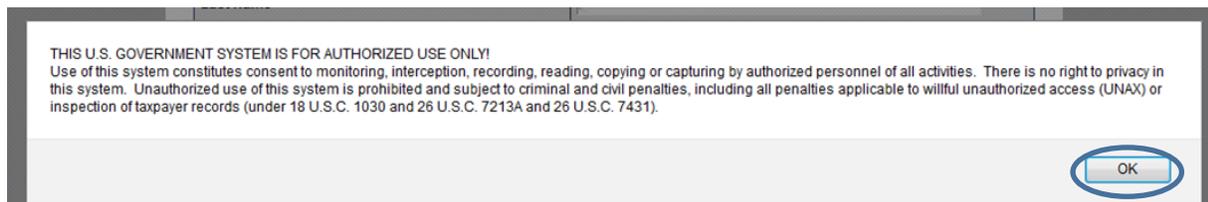
If you have any questions or problems using this tool, view available [Help](#) options for assistance.

SKIP IRS TRANSFER **PROCEED TO IRS SITE**

A window will open that says “Leaving the FAFSA on the Web”

Click on “Proceed to the IRS Site”

You will be redirected to irs.gov. Click “OK” to accept the terms of use and access to the IRS website.



Enter your name and address into the IRS form EXACTLY as it appears on your 2016 tax return. For example, if your return says “Avenue”, type “Avenue” not “Ave.”

Click on “Submit” then follow the rest of the on screen directions to finish transferring your tax information. In order to better protect financial aid applicants’ information, starting this year the Department of Education has announced the DRT will 'limit the information that displays to the applicant in order to enhance the security and privacy of sensitive personal data transferred to the FAFSA from the IRS.' Sensitive data, such as adjusted gross income, will not be displayed to the applicants. If the DRT works, you will see the words “Transferred from the IRS” but not the data that was transferred. Rest assured the information will be transferred into your FAFSA exactly as you entered it on your tax return.

If the DRT does not work or you are ineligible to use it and you are filing a new FAFSA, enter your information from your 2016 federal tax return into the FAFSA manually. 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. 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.

5) Complete the FAFSA

Answer any remaining question 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 question. If the answer to the question is zero, type “0”. This can help you avoid having to submit additional documentation later on.

6) Sign and Submit the FAFSA

Student Demographics School Selection Dependency Status Parent Demographics Financial Information

Sign & Submit

Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a preparer?
 Yes No

Student Signature

Student's Social Security Number

Student's last name

Student's date of birth

READ BEFORE PROCEEDING
By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education.
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it.
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it.
4. ~~will notify your school if you default on a federal student loan, and~~

I, the student, agree to the terms outlined above.
 Agree Disagree

[SIGN](#)

[< PREVIOUS](#) [SUBMIT MY FAFSA NOW](#)

Answer the question “Are you a preparer?” No. Preparers are paid money to file the FAFSA for you.

Students: If you logged in with your FSA ID, select Agree and click on SIGN.