



2016-2017

Using the DRT Tool for FAFSA Verification

4301 Broadway CPO 308
 San Antonio, Texas 78209
 Phone: (210) 829-6008
 Fax: (210) 283-5053
www.uiw.edu/finaid
finaid@uiwtx.edu

When your FAFSA is selected for verification, you may be required to provide your tax information from the previous tax year. The fastest method is to use the DRT tool within your FAFSA to import your tax information directly from the IRS. If you attempt to use the DRT but are not able/eligible, you can request a Tax Return Transcript instead. Instructions for requesting a Tax Return Transcript can be found online at <http://www.uiw.edu/finaid/verification/index.html>.

1. Go to www.fafsa.ed.gov to log in to your FAFSA using your FSA ID.
2. Once you've logged in, click on the "Financial Information" tab, and indicate your tax filing status:

The screenshot shows the FAFSA 'Financial Information' tab. Under 'Student Tax Information', there is a message: 'Application was successfully saved.' Below that, a question asks: 'For 2015, have you completed your IRS income tax return or another tax return?' The dropdown menu is set to 'Already completed'. A red box highlights this dropdown, and a red arrow points to a text box that says: 'If you have not yet completed your 2015 taxes, you need to wait to use the DRT until 3 weeks after you filed.' Below this, another question asks: 'For 2015, what is your tax filing status according to your tax return?' with a 'Select' dropdown. At the bottom, there are buttons for 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. On the right, there is a 'Help and Hints' section with 'Student Filed 2015 Income Tax Return? Question 32' and instructions: 'You must select the answer that describes your tax' and 'If you indicate you "Will file" a 2015 tax return and your 2015 income is similar to your 2014 income, use your 2014 income tax return to provide estimates for questions about your'.

3. Indicate whether you filed a 1040x, a foreign tax return or filed in the past 3 weeks. If you did, you're not eligible for the DRT. If you filed a 1040x or a foreign tax return, see our [Verification FAQs](#) for instructions. If you are eligible, click to proceed to the IRS website:

The screenshot shows the FAFSA 'Parent' section. A question asks: 'To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):'. Below this are two questions: 'Did you file a Form 1040X amended tax return?' and 'Did you file a Puerto Rican or foreign tax return?'. Both have radio buttons for 'Yes' and 'No'. A red box highlights these two questions, and a red arrow points to a text box that says: 'If you must answer "yes" to either of these, you are not eligible to use the DRT. See our website for details on how to provide your tax information instead.' Below these questions is another question: 'Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?' with radio buttons for 'Yes' and 'No'. At the bottom, there is a text box that says: 'Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.' Below this text box is a blue button labeled 'LINK TO IRS'. A red arrow points from this button to a text box that says: 'Click here to proceed to the IRS website and import your tax info.' On the right, there is a 'Help and Hints' section with text: 'If you filed your taxes within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#):' and 'table to' and ':AFSA at gain in a n' and 'ix return' and 'information.'

4. Enter your personal info to access your 2015 tax information, then click “submit”:

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2015 Federal Income Tax Return. ? Required fields *

First Name *	
Last Name *	
Social Security Number *	*** - **
Date of Birth *	/ /
Filing Status * ?	
Address - Must match your 2015 Federal Income Tax Return. ?	
Street Address *	
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	
Country *	United States
City, Town or Post Office *	
State/U.S. Territory *	Select One
ZIP Code *	

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

[Return to FAFSA](#) [Submit](#)

5. The data from your 2015 taxes will appear. Click “Transfer Now” to import your tax info into your FAFSA:

	My Tax Information	FAFSA Question Numbers ?
Tax Year		
Name(s)		
Social Security Number		
Filing Status		Question 34 on the FAFSA
Type of Tax Return Filed		Question 33 on the FAFSA
Adjusted Gross Income		Question 36 on the FAFSA
Income Earned From Work ?		Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Student: Question 39 on the FAFSA and/or Spouse: Question 40 on the FAFSA
Income Tax		Question 37 on the FAFSA
IRS Exemptions		Question 38 on the FAFSA
Education Credits	\$0	Question 44a on the FAFSA
IRA Deductions and Payments	\$0	Question 45b on the FAFSA
Tax-Exempt Interest Income	\$0	Question 45d on the FAFSA
Untaxed IRA Distributions ?	\$0	Question 45e on the FAFSA
Untaxed Pensions ?	\$0	Question 45f on the FAFSA

Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA ?

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

[Transfer Now](#) ?

Do Not Transfer My Tax Information and Return to the FAFSA ?

By clicking the “Do Not Transfer” button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.

[Do Not Transfer](#) ?

6. You will see that your tax information has been imported into your FAFSA. Do not change the imported data, but do enter the wages of each party if you filed jointly with another person:

7. Make sure to proceed to the “Sign & Submit” tab to apply both student and parent signatures by using the respective FSA IDs. Regardless of whose tax information was imported, BOTH the student and parent must sign the FAFSA again. Independent students do not need parent signature.

8. Congratulations! Your tax data is now included in your FAFSA, and a record of this will be sent automatically to our financial aid office. Once we receive it, we will proceed with verification if all other documents are received. Please allow 3-5 days for verification to be completed. You will be notified through your Cardinal Mail email when the process is complete.