

2020-2021 Step-By-Step DRT Instructions

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Please refer to the step-by-step instructions below to utilize the Data Retrieval Tool (DRT), when completing your 2020-2021 FAFSA application on the web. If you are a dependent student, and need to transfer your parent(s)' 2018 tax information as well, the instructions will work similarly when transferring the parent(s)' information.

You will be able to utilize the Confirmation Financial Demographics DRT tool when you reach the "Financial Information" tab in Student Tax Information your 2020-2021 FAFSA **Help and Hints** application. Please make sure the Did you file a Puerto Rican or foreign tax return? following 3 questions are Attention! You must provide financial information from your 2016 tax If you filed a Puerto Rican or return on the following pages. answered to use the DRT tool. T otherwise, select No. U **Please note your 2018 tax You are not eligible to use the Application was successfully saved. IRS Data Retrieval Tool if you filed a Puerto Rican or foreign D return will need to be already completed and processed by the Ε For 2016, have you completed your IRS income tax return or another tax return? Related Topics: IRS to use the DRT tool: N Already completed V Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.? For 2016, what is your tax filing status according to your tax return? Did you file a Puerto Rican or foreign tax return for 2016? O Yes 🖲 No If you are eligible to use the DRT tool, the Link to IRS Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DBT)! option will appear: LINK TO IRS **Click Link to IRS** PREVIOUS NEXT NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT Sign & Confirmation Demographics Demographics Status Information **Help and Hints** What is your (the student's) FSA ID Username or Verified E-mail Address? Leaving FAFSA on the Web You are now leaving FAFSA on the Web and will be transferred to the IRS Web site to S access your IRS tax information. Your FAFSA information will be saved You must enter your FSA ID T Your saved FAFSA will automatically open either when you transfer your information from username. If you have verified the IRS or choose to return to FAFSA on the Web from the IRS Web site. If you do no the e-mail address on file with U transfer your information or choose not to return to FAFSA on the Web from the IRS Web your FSA ID, you may use it site, you will have to log in to open your saved FAFSA instead of your username to On the next screen, please enter D access the IRS Web site and request your income tax For your protection, your tax return information will not display on the IRS Web site your FSA ID login information: E or on the FAFSA. information N What is your (the student's) FSA ID? If you do not already have an FSA ID Username or Verified E-mail FSA ID, you can create an FSA T If you have an FSA ID but do FSA ID Password not remember your username or verified e-mail address, click Forgot Username Click Proceed to IRS Site to continue. Otherwise, click Skip IRS Transfer. Note: Your FSA ID e-mail address may be different from Then, click Proceed to IRS Site If you have any guestions or problems using this tool, view available Help options for vour FAFSA e-mail address. SKIP IRS TRANSFER PROCEED TO IRS SITE

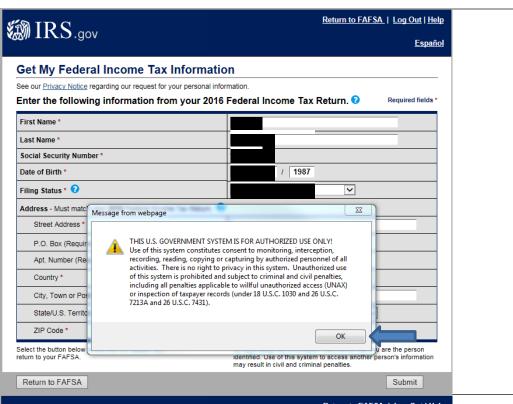
When you arrive at IRS.gov, a consent to monitoring message from the Internal Revenue Service will appear.

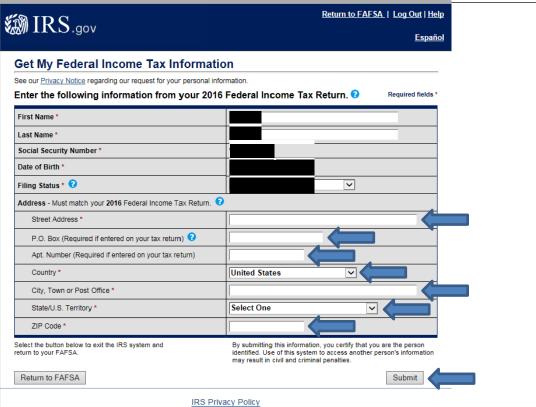
To continue with the data transfer, **click OK**

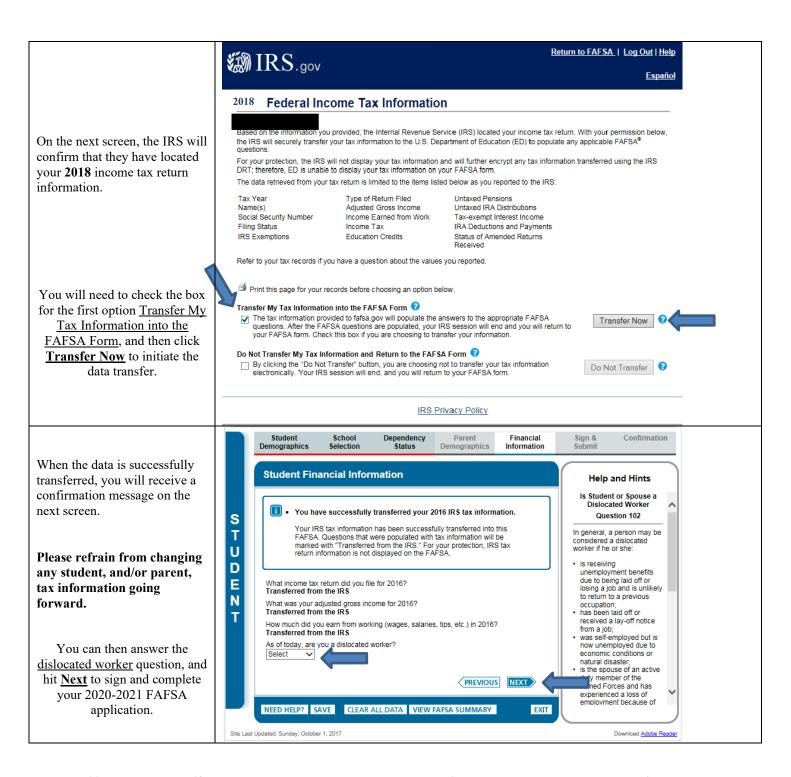
Your First/Last name, last 4 of SSN #, DOB, and **2018** filing status information will be visible on your screen.

You will need to enter the street address **exactly** the way it was reported on the filer(s) **2018** tax return, in order to be located by the IRS.

When you are finished entering the address information, click Submit:







^{**}Please note that if you are not able to use the DRT tool, you will need to manually enter you and/or your parent(s)' 2018 tax information, using a 2018 tax return copy.