



2020-2021 Step-By-Step DRT Instructions

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 DRT tool when you reach the "Financial Information" tab in your 2020-2021 FAFSA application. Please make sure the following 3 questions are answered to use the DRT tool.

****Please note** your 2018 tax return will need to be **already completed** and processed by the IRS to use the DRT tool:

If you are eligible to use the DRT tool, the **Link to IRS** option will appear:

Click **Link to IRS**

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.?](#)

On the next screen, please enter your FSA ID login information:

Then, click **Proceed to IRS Site**

Help and Hints

What is your (the student's) FSA ID Username or Verified E-mail Address?

You **must** enter your FSA ID username. If you have verified the e-mail address on file with your FSA ID, you may use it instead of your username to access the IRS Web site and request your income tax information.

If you do not already have an FSA ID, you can [create an FSA ID](#).

If you have an FSA ID but do not remember your username or verified e-mail address, click [Forgot Username](#).

Note: Your FSA ID e-mail address may be different from your FAFSA e-mail address.

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**

The screenshot shows the IRS.gov website with the title "Get My Federal Income Tax Information". At the top right are links for "Return to FAFSA | Log Out | Help" and "Español". Below the title is a link to the "Privacy Notice". The main heading is "Enter the following information from your 2016 Federal Income Tax Return." followed by "Required fields *". The form includes fields for First Name, Last Name, Social Security Number, Date of Birth (with "1987" visible), and Filing Status. The "Address" section is partially visible. A modal dialog box titled "Message from webpage" is centered on the screen, containing a warning icon and the text: "THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY! Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431)." An "OK" button is at the bottom of the dialog. A blue arrow points to the "OK" button. At the bottom of the page are "Return to FAFSA" and "Submit" buttons.

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:**

This screenshot is identical to the one above but with several blue arrows pointing to the address fields: "Street Address", "P.O. Box", "Apt. Number", "Country" (set to "United States"), "City, Town or Post Office", "State/U.S. Territory" (set to "Select One"), and "ZIP Code". The "OK" dialog box is no longer present. The "Submit" button at the bottom right is also highlighted with a blue arrow. At the bottom center of the page is a link for "IRS Privacy Policy".

On the next screen, the IRS will confirm that they have located your **2018** income tax return information.

You will need to check the box for the first option Transfer My Tax Information into the FAFSA Form, and then click Transfer Now to initiate the data transfer.

2018 Federal Income Tax Information

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

Tax Year	Type of Return Filed	Untaxed Pensions
Name(s)	Adjusted Gross Income	Untaxed IRA Distributions
Social Security Number	Income Earned from Work	Tax-exempt Interest Income
Filing Status	Income Tax	IRA Deductions and Payments
IRS Exemptions	Education Credits	Status of Amended Returns Received

Refer to your tax records if you have a question about the values you reported.

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

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.

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

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 form.

[Transfer Now](#) ?

[Do Not Transfer](#) ?

[IRS Privacy Policy](#)

When the data is successfully transferred, you will receive a confirmation message on the next screen.

Please refrain from changing any student, and/or parent, tax information going forward.

You can then answer the dislocated worker question, and hit Next to sign and complete your 2020-2021 FAFSA application.

STUDENT

Student Financial Information

You have successfully transferred your 2016 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS." For your protection, IRS tax return information is not displayed on the FAFSA.

What income tax return did you file for 2016?
Transferred from the IRS

What was your adjusted gross income for 2016?
Transferred from the IRS

How much did you earn from working (wages, salaries, tips, etc.) in 2016?
Transferred from the IRS

As of today, are you a dislocated worker?
Select

[PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Help and Hints

Is Student or Spouse a Dislocated Worker Question 102

In general, a person may be considered a dislocated worker if he or she:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- has been laid off or received a lay-off notice from a job;
- was self-employed but is now unemployed due to economic conditions or natural disaster;
- is the spouse of an active duty member of the Armed Forces and has experienced a loss of employment because of

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****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.**