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# 2018-2019
# Step-By-Step DRT Instructions

Please refer to the step-by-step instructions below to utilize the Data Retrieval Tool (DRT), when completing your 2018-2019 FAFSA application on the web. If you are a dependent student, and need to transfer your parent(s)' 2016 tax information as well, the instructions will work similarly when transferring the parent(s)' information.

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| You will be able to utilize the DRT tool when you reach the "Financial Information" tab in your 2018-2019 FAFSA application. Please make sure the following 3 questions are answered to use the DRT tool.<br><br>**\*\*Please note** your 2016 tax return will need to be **already completed** and processed by the IRS to use the DRT tool:<br><br><br><br>If you are eligible to use the DRT tool, the **Link to IRS** option will appear:<br><br>**Click Link to IRS** |  |
| On the next screen, please enter your FSA ID login information:<br><br><br><br>**Then, click Proceed to IRS Site** |  |

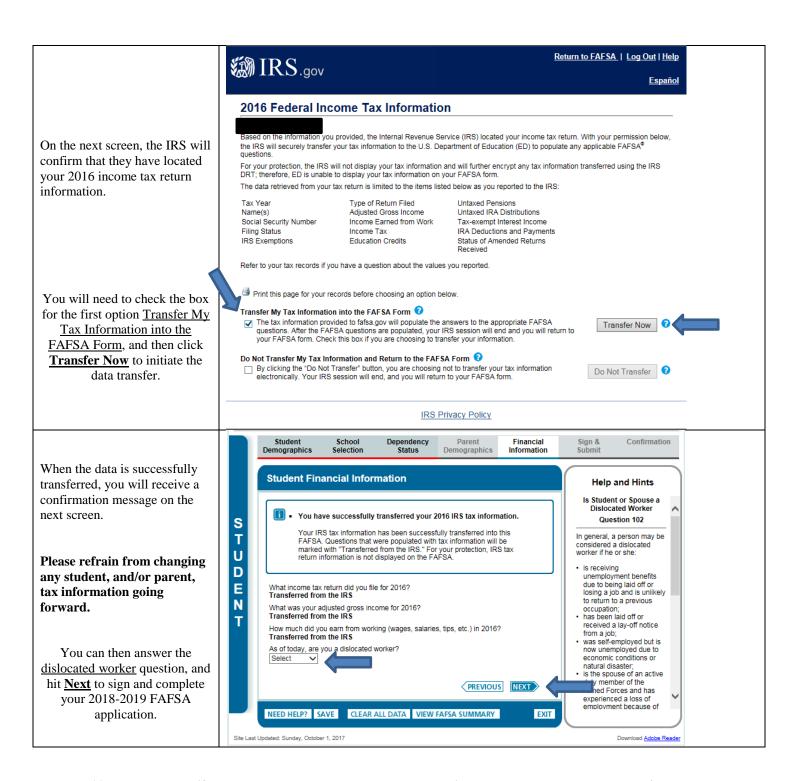| | |
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| When you arrive at IRS.gov, a consent to monitoring message from the Internal Revenue Service will appear.<br><br>To continue with the data transfer, **click OK** | <br>**IRS.gov**<br><br>**Get My Federal Income Tax Information**<br>See our Privacy Notice regarding our request for your personal information.<br>**Enter the following information from your 2016 Federal Income Tax Return.** ❓   Required fields *<br><br>First Name *<br>Last Name *<br>Social Security Number *<br>Date of Birth *<br>Filing Status * ❓<br>**Address** - Must matc...<br>Street Address *<br>P.O. Box (Requir...<br>Apt. Number (Re...<br>Country *<br>City, Town or Po...<br>State/U.S. Territo...<br>ZIP Code *<br><br>**Message from webpage** ✕<br>⚠️ 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).<br>OK<br><br>Select the button below...<br>return to your FAFSA.<br>...u are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.<br>Return to FAFSA          Submit |
| Your First/Last name, last 4 of SSN #, DOB, and 2016 filing status information will be visible on your screen.<br><br>You will need to enter the street address **exactly** the way it was reported on the filer(s) 2016 tax return, in order to be located by the IRS.<br><br>When you are finished entering the address information, **click Submit:** | <br>**IRS.gov**<br><br>**Get My Federal Income Tax Information**<br>See our Privacy Notice regarding our request for your personal information.<br>**Enter the following information from your 2016 Federal Income Tax Return.** ❓   Required fields *<br><br>First Name *<br>Last Name *<br>Social Security Number *<br>Date of Birth *<br>Filing Status * ❓<br>**Address** - Must match your 2016 Federal Income Tax Return. ❓<br>Street Address *<br>P.O. Box (Required if entered on your tax return) ❓<br>Apt. Number (Required if entered on your tax return)<br>Country *   United States<br>City, Town or Post Office *<br>State/U.S. Territory *   Select One<br>ZIP Code *<br><br>Select the button below to exit the IRS system and return to your FAFSA.<br>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.<br>Return to FAFSA          Submit<br><br>IRS Privacy Policy |

On the next screen, the IRS will confirm that they have located your 2016 income tax return information.

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

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 <u>dislocated worker</u> question, and hit **Next** to sign and complete your 2018-2019 FAFSA application.

**\*\*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)' 2016 tax information, using a 2016 tax return copy.**