

The FAFSA IRS Data Retrieval (DRT) Process for Tax Filers

Quick and Easy ... Just LINK IT!

The FAFSA process includes the ability for most federal income tax filers to import certain information from their federal tax return into the FAFSA application, a process called "IRS Data Retrieval" (DRT). This can be done upon submission of the original FAFSA on the Web, or when the applicant electronically corrects the data. If you used this process when completing/correcting your FAFSA you do not need to submit copies of your Federal Tax Return Transcript unless specifically requested to do so in a letter sent by us.

SIMPLE STEPS TO TRANSFER TAX INFORMATION INTO YOUR FAFSA®

The IRS Data Retrieval Tool (IRS DRT) Electronically Transfers Your Federal Tax Return Information Into Your FAFSA®

WHY

EASY Transfer info with the click of a button.

FAST Instantly retrieve your information.

ACCURATE Correctly fill in data fields.

HOW



1

Log in to your current FAFSA, or start a new FAFSA at fafsa.gov

2

In the finances section of the FAFSA, you will see a "Link to IRS" button if you are eligible to use the IRS DRT.

3

Click the "Link to IRS" button and log in to the IRS site to retrieve your tax return information.

4

Review your tax return information, and see the tax data that will be transferred into your FAFSA.

5

Check the "Transfer My Tax Information into the FAFSA" box, and click the "Transfer Now" button.

6

Review your federal tax return information that has been transferred into the data fields on your FAFSA.



The IRS DRT can be used by both students and parents.

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of the AMERICAN MIND®

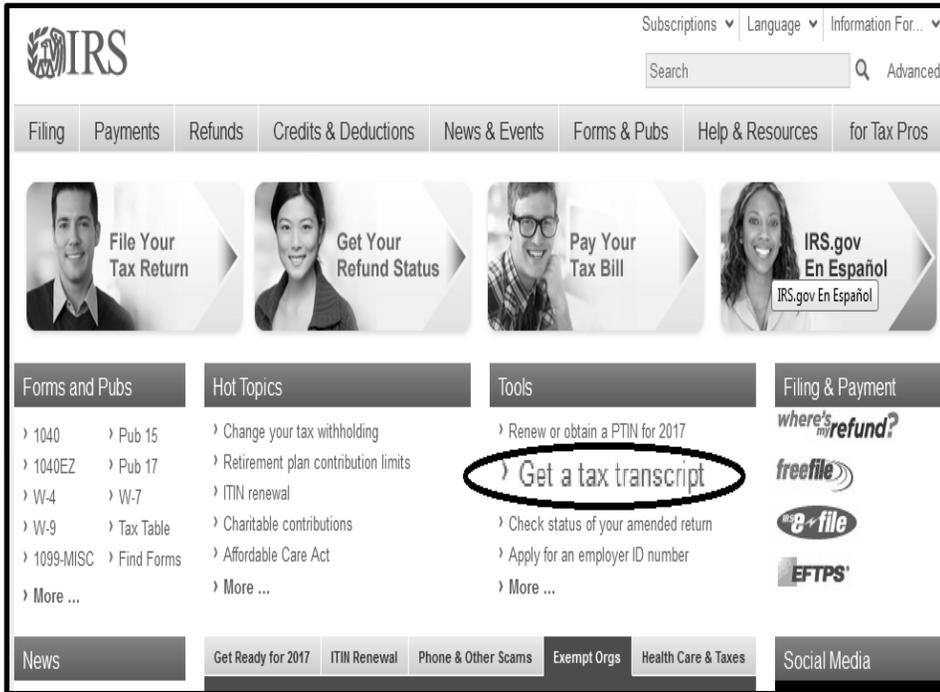
To learn more about the IRS DRT, visit StudentAid.gov/irsdrt

OVER →

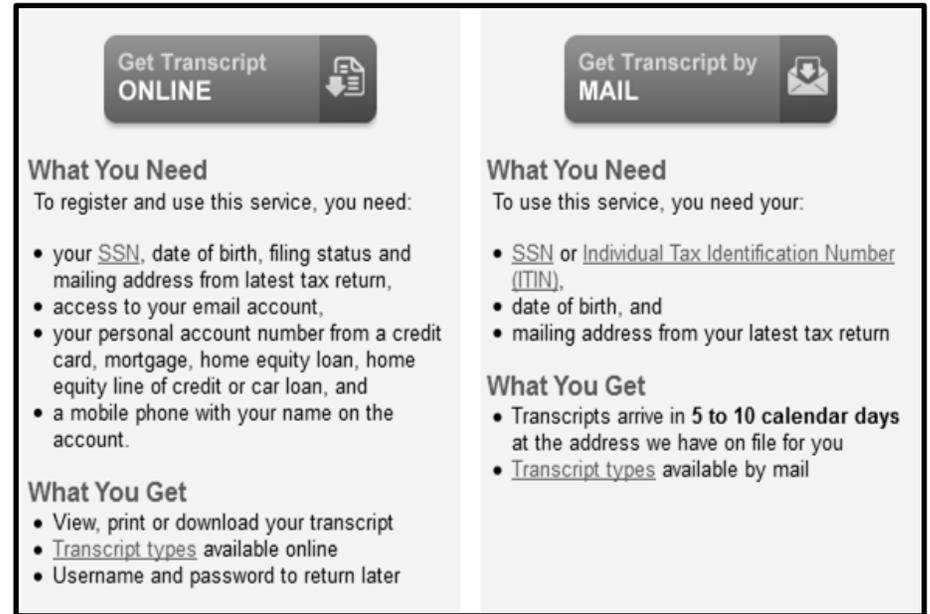
Request an IRS Tax Return Transcript and/or Wage & Income Transcript

If we have requested that you, your spouse, and/or your parents submit a copy of your/their 2015 Federal Tax Return Transcript, and/or Wage and Income Transcript **OR** if you cannot utilize the IRS DATA RETRIEVAL TOOL (DRT- Link to IRS) on FAFSA ON THE WEB, you can request a hard copy by visiting www.irs.gov and clicking on GET A TAX TRANSCRIPT.

Next, you will be given with the option to obtain a free copy of your *Tax Return Transcript and/or Wage and Income Transcript for 2015*, either online or by mail: The method you used to file your tax return (e-file or paper) and whether you had a balance due affects your current transcript availability



The screenshot shows the IRS website interface. In the 'Tools' section, the link 'Get a tax transcript' is circled in red. Other visible links include 'Renew or obtain a PTIN for 2017', 'Check status of your amended return', and 'Apply for an employer ID number'. The 'Filing & Payment' section includes 'where's my refund?', 'efile', 'e-file', and 'EFTPS'.



This block compares the two methods for obtaining transcripts. The 'ONLINE' option is highlighted with a dark background and a document icon. The 'MAIL' option is highlighted with a dark background and an envelope icon.

Get Transcript ONLINE

What You Need
To register and use this service, you need:

- your SSN, date of birth, filing status and mailing address from latest tax return,
- access to your email account,
- your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- a mobile phone with your name on the account.

What You Get

- View, print or download your transcript
- Transcript types available online
- Username and password to return later

Get Transcript by MAIL

What You Need
To use this service, you need your:

- SSN or Individual Tax Identification Number (ITIN),
- date of birth, and
- mailing address from your latest tax return

What You Get

- Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you
- Transcript types available by mail

For more information, visit **GET TRANSCRIPT FAQs** at www.irs.gov/individuals/get-transcript-faqs.

If you're unable to register at www.irs.gov or you prefer not to use GET TRANSCRIPT ONLINE you may order a Tax Return Transcript and/or a Wage and Income Transcript by calling 800-908-9946 or completing and submitting IRS Form 4506-T at www.irs.gov

How to Request an IRS Verification of Non-Filing Letter

An IRS Verification of Non-Filing Letter will provide proof from the IRS that there is no record of a filed tax form (1040, 1040A, or 1040EZ) for the year you have requested. For the 2017-2018 academic year you will be requesting a Verification of Non-Filing for the 2015 tax year. The IRS Verification of Non-Filing Letter should be dated on or after October 1, 2016.

If requested by us, an IRS Verification of Non-Filing Letter can be obtained online using the **IRS Get Transcript service** at www.irs.gov. If the individual cannot obtain one online for whatever reason, it must be obtained by completing and checking box 7 on the **IRS Form 4506-T** (Be sure to indicate 12/31/15 on line 9), and mailing it to the IRS.