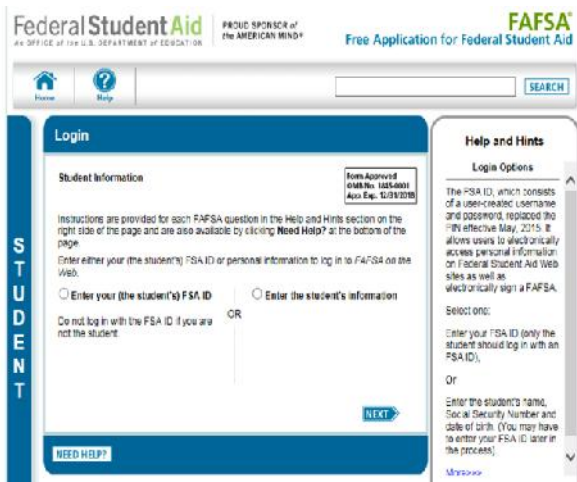


# Using the IRS Data Retrieval Tool: 2018-2019 Academic Year

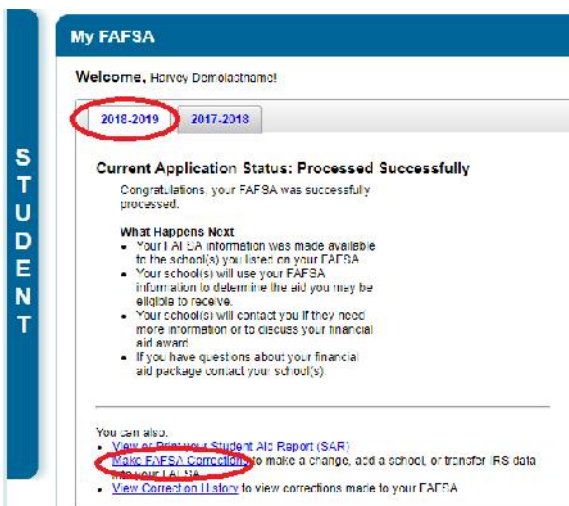
The Data Retrieval Tool (DRT) is a fast, convenient and accurate way to transfer answers from your tax return directly to your FAFSA. To be sure that you are eligible to use the DRT, go to <https://fafsa.ed.gov/help/irshlp10.htm>.



1. Go to [www.fafsa.gov](http://www.fafsa.gov) and click **Login** on the right. Be sure to use the **student's information**.



2. Enter the student's FSA ID and click **Next**.



3. Click on the **2018-2019** tab, and click on **Make FAFSA Corrections** in the lower left

4. On the next screen (sample not shown) you will create a **Save Key** (similar to a password), click **Next** and on the next screen (Intro Page – also not shown) click **Next** again. This **Save Key** can be used so that your parent can log in at a later time (using your SSN and birthdate) without knowing your FSA ID.

5. Click on the **Financial Information** tab near the top of the screen. The initial screen is **Parent Tax Information** (see below). **If you are unable to skip** to this section, you must scroll to the bottom of each screen and click “Next”.

If you are updating only student information, scroll to the bottom and click **Next**. Follow the same/similar steps whether updating parent or student information.

6. For the first question (“...have you completed your income tax return...”) select “Already Completed.”

7. If all “yes/no” questions are answered “no” you will be given the option to link to the IRS. Provide any required information then click “Link to IRS” (arrow below).

8. After providing the FSA ID and “Next” button, you will be advised that you are leaving FAFSA on the Web. Click “OK.” (screenshot not provided)



### Get My Federal Income Tax Information

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

Enter the following information from your 2016 Federal Income Tax Return. Required fields \*

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	<input type="text"/>
Date of Birth *	<input type="text"/>
Filing Status *	Single
Address: Must match your 2016 Federal Income Tax Return	
Street Address *	<input type="text"/>
PO Box (Required if entered on your tax return)	<input type="text"/>
Ap. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States
City, town or Post Office *	<input type="text"/>
State/ U. S. Territory *	Select One
ZIP Code *	<input type="text"/>

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

By submitting this information, you verify 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](#)

9. Provide details for the tax filer on the screen “Get My Federal Income Tax Information” exactly as it appears on the return you/your parent filed.

Ex: if the street address on your tax return is “1234 South Main Street” **do not** enter “1234 S. Main St” on this screen. Click “Submit”.

Return to FAFSA | Log Out | Help  
Español

### 2016 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	Unpaid Pensions
Name(s)	Adjusted Gross Income	Unpaid 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

10. If your answers match what is on file at the IRS, the next screen (left) shows which answers will be transferred from IRS records to the FAFSA.

Check the box for **Transfer My Tax Information** (circled left) and click **Transfer Now** (circled left) and these answers will be populated within the FAFSA.

**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**

11. You will return to the FAFSA website. For security reasons, you will not see the actual values transferred.

**Notify the Office of Financial Aid if your/your parent's 2016 income included a rollover.**

Review /change only other values which may require it, using the Help and Hints box on the right side.

Veterans noneducation benefits

Other untaxed income not reported such as workers' compensation or disability benefits

Other untaxed income not reported, such as workers' compensation, disability benefits, etc.  
\$ 5,500.00

As of today, does the total amount of your parents' current **assets** exceed \$17,800.00?  
 Yes  No

As of today, what is your parents' total current balance of cash, savings, and checking accounts?  
\$ .00

As of today, what is the net worth of your parents' investments, including real estate (not your parents' home)?  
\$ .00

As of today, what is the net worth of your parents' current businesses and/or investment farms?  
\$ .00

12. Near the bottom of the screen you will see your original answers to three questions about savings, investments, and business/farm. Correct them only if they were not accurate the first time you submitted the FAFSA. **Do not update answers to reflect changes that have taken place since then.**

13. Click "Next" and you will see "Student Financial Information" (sample not shown). If the student needs to use the Data Retrieval Tool, repeat Steps 6-12 above. If the student didn't file a return or is not ready to use the DRT, go to Step 14.

14. After moving through all of the **Corrections** screens you will see a **List of Changes** screen which we recommend that you print/save.

Student Demographics | School Selection | Dependency Status | Parent Demographics | Financial Information | **Sign & Submit**

### Sign & Submit

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

#### Student Signature

Student's Social Security Number: XXX-XX-0007  
 Student's last name: DEMOLASTNAME  
 Student's date of birth: 04/19/1995

**READ BEFORE PROCEEDING**  
 By signing this application electronically using your FSA ID (username and password) and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

- will use federal and/or state student financial aid only to pay the cost of attending a institution of higher education,
- are not in default on a federal student loan or have made satisfactory arrangements to repay it,
- do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
- will notify your school if you default on a federal student loan, and

I, the student, agree to the terms outlined above.  
 Agree  Disagree

#### Parent Signature

Are you signing as the student's Parent 1 (father/mother/stepparent), or Parent 2 (father/mother/stepparent)?  
 Parent 1 (Father/Mother/Stepparent)  Parent 2 (Father/Mother/Stepparent)

**READ BEFORE PROCEEDING**  
 By signing this application electronically using your FSA ID (username and password) and/or any other credential or by signing a signature page and mailing it to us, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked:

- to provide information that will verify the accuracy of your completed form
- to provide U.S. or state income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

I, the parent, agree to the terms outlined above.  
 Agree  Disagree

What is your (the parent's) FSA ID?  
 (Do not enter the FSA ID if you are not the parent)

FSA ID Username or Verified E-mail Address:  [Create an FSA ID](#)  
 FSA ID Password:  [Forgot Username](#)  
[Forgot Password](#)  
[Other options to sign and submit](#)

[PREVIOUS](#)

14. Continue to the "Sign & Submit" tab (upper right). Follow all instructions carefully (screenshot left) to include signatures for both **student** and **parent**.

**It is important to not mix the student / parent FSA IDs.**

Next, click **Submit My FAFSA Now**.

**2018-2019 Confirmation Page**

[PRINT THIS PAGE](#) **Confirmation Number:** D10701210205 01 21022019 11:00:04  
**Data Release Number (DRN):** 9996

Congratulations, **LARRY!** Your FAFSA was successfully submitted to Federal Student Aid and has been processed.

**What Happens Next**

- In 7-10 business days, we will mail you a Student Aid Report (SAR) notifying you that your FAFSA was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

**School(s) on your FAFSA**

School Name	Graduation Rate	Retention Rate	Transfer Rate	Additional Information from College Advisor
ALABAMA A&M COLLEGE SYSTEM - MOBILE UNIV	77%	85%	38%	NA

**Eligibility Information** Based on the [eligibility data](#), you may be eligible for the following:

**Educational Family Contribution (EFC):** 999699  
 The EFC is a measure of how much you can contribute to the cost of your education. Contact your school to determine your federal student aid eligibility.

The EFC is not how much aid you will receive or how much you have to pay for college.

[Help with EFC](#) - Estimate - \$1,500.00  
[Need Student Loan](#) - Estimate - \$1,500.00

You may also be eligible to receive other federal, state, or institutional grants, scholarships, and/or work-study.

In addition, you should learn about federal tax benefits for education including the American Opportunity Tax Credit (AOTC).

You and your parents indicated that you were going to file your taxes and were providing estimator 2018 tax information. When you and your parents have filed your tax returns, you can update the information you provided on the FAFSA to reflect the actual information from the 2018 tax return you and your parents filed. If you filed a federal tax return with the IRS, when you access your FAFSA online, you may be eligible to use the [IRS Data Retrieval Tool](#), which is the best and easiest way to provide accurate

15. **Very important:** the process has been completed only if you see this Confirmation Page (left).

Print or save the confirmation page for your records.