

Using the IRS Data Retrieval Tool: 2019-2020 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>.

An easy-to-follow video is also available online at www.lakeforest.edu/fafsa on the right side under “Helpful Tools.”

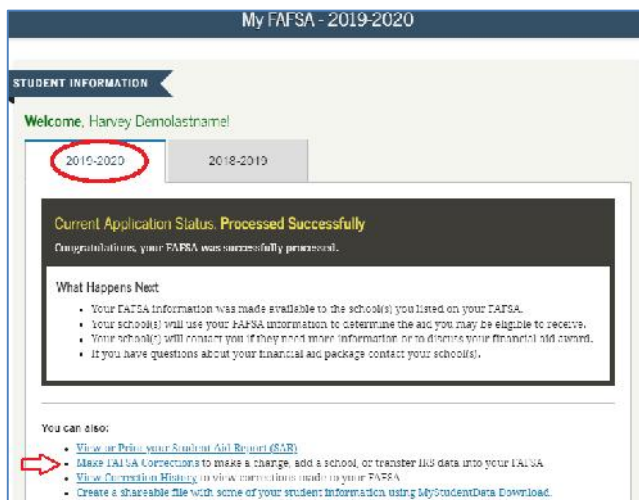


1. Go to www.fafsa.gov and click **Login** on the right. Be sure to use the **student's information**.



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

Parents: click the option to “enter the student’s information” (name, SSN, date of birth) and then, when prompted on the second screen, enter the SAVE KEY your child created.



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.

The screenshot shows the 'Parent Tax Filing Status' screen. At the top, there are progress indicators for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'Financial Information' tab is active. Below the progress bar, the question is: 'For 2017, have your parents completed their IRS income tax return or another tax return?'. A dropdown menu is open, showing options: 'Already completed', 'Will file', and 'Not going to file'. 'Already completed' is selected. There are 'PREVIOUS' and 'NEXT' buttons at the bottom.

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

This screenshot shows the next question: 'For 2017, what is your parents' tax filing status according to their tax return?'. The dropdown menu shows 'Married Filing Joint Return'. Below this, there is a question: 'Did your parents file a U.S. or foreign tax return for 2017?' with radio buttons for 'Yes' and 'No'. At the bottom, there is a section titled 'IRS Data Retrieval Tool' with a 'LINK TO IRS' button circled in red.

7. Based on your answers to the next questions, you *may* be given the option to link to the IRS. Provide any required information then click “Link to IRS.”

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)

The screenshot shows the 'Get My Federal Income Tax Information' screen. It asks to 'Enter the following information from your 2017 Federal Income Tax Return.' Fields include: First Name (Mark), Last Name (Jones), Social Security Number (***-**-0611), Date of Birth (9 / 10 / 1964), Filing Status (Married Filing Joint Return), and Address. The address fields are: Street Address, P.O. Box, Apt. Number, Country (United States), City/Town/Village, State (Select One), and ZIP Code. Red arrows point to the Street Address, P.O. Box, Apt. Number, City/Town/Village, State, and ZIP Code fields. At the bottom, there is a 'Return to FAFSA' button and a 'Submit' button circled in red.

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”.

Solid red arrows indicate required fields.

Hollow arrows indicate fields which *may* be required.

(You will not see arrows on the IRS site!)

2017 Federal Income Tax Information

Mark

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission, 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 listed in the items listed below as you reported to the IRS:

Tax Year (Name(s))	Types of Return Filed	Unearned Pensions
Social Security Number	Adjusted Gross Income	Unearned IRA Distributions
Filing Status	Income Earned from Work	Tax-exempt Interest Income
IRS Form(s)	Income Tax	IRA Deductions and Payments
	Education Credits	Student or Annuity Rollover (Rollover)

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 lets.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.

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. You will not see values.

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.

Parent IRS Info

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

You have successfully transferred 2017 IRS tax information.

The parents' 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 type of income tax return did your parents file for 2017?
Transferred from the IRS

What was your parents' adjusted gross income for 2017?
Transferred from the IRS

11. You will return to the FAFSA website, and will see confirmation that 2017 IRS tax information was transferred. For security reasons, you will not see the actual values transferred, but the words **"Transferred from the IRS"**

Notify the Office of Financial Aid if your/your parent's 2017 income included a rollover.

Parent Income from Work

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

How much did your Parent 1 (father/mother/sepparent) earn from working (wages, salaries, tips, etc.) in 2017?

\$.00

How much did your Parent 2 (father/mother/sepparent) earn from working (wages, salaries, tips, etc.) in 2017?

\$.00

12. For many, you will need to enter (separate) values for "income from work" earned by each parent.

Over the next five screens (may be more or less) enter other **parent** values as needed. Do not leave blank.

If you are making corrections to your **original FAFSA**, you will see your original answers to questions about savings, investments, business/farm. Correct them only if they were *incorrect* the first time you submitted the FAFSA. **Do not update answers to reflect changes that have taken place since then.**

13. After seeing/answering the parental asset questions, click "Next" and you will see "Student Financial Information" (sample not shown). Answer all questions about the student's 2017 income (use the same Data Retrieval Tool process in 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. If you are making corrections to your **original FAFSA**, you will have the option to **List of Changes** or a summary of your entire application. We recommend that you print/save both.

15. 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.

Note that there are options to submit a signature, other than an electronic signature (FSA username and password). They will take longer to process, so they are not normally recommended.

Once any intended signature is provided, click Submit My FAFSA Now.

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

Print or save the confirmation page for your records. It may be needed if the federal student aid processing center cannot locate your FAFSA at a later time.