

# 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 [www.fafsa.gov](http://www.fafsa.gov)

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

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

**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.

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

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

## WHEN

### AVAILABLE

The IRS DRT is available the first Sunday in February.

### TRANSFER

Depending on whether you filed your taxes electronically or by mail, you may be able to use the IRS DRT in as little as two weeks from when you filed your tax return.

### REMEMBER

If you submitted your FAFSA before you filed your taxes, you can still transfer your tax return information. Log in to your FAFSA and update your tax return status to "Already Completed." You will see the link to the IRS DRT. Follow steps three through six above and resubmit your FAFSA.

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

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To learn more about the IRS DRT,  
visit [StudentAid.gov/irs-drt](http://StudentAid.gov/irs-drt)

## **Request Tax Return Transcripts Online**

1. Go to the IRS online ordering system: <https://sa1.www4.irs.gov/irfof-tra/start.do>
2. Enter your Social Security Number
3. Enter your date of birth
4. Enter your street address

**NOTE:** *If you do not enter your address in exactly the same way it was entered on your tax return the IRS will not be able to process your request.*

5. Enter your zip code
6. Click Continue
7. Select "**Return Transcript**" for the type of transcript
8. Select the tax year you are requesting a transcript for
9. Select Continue
10. You will now see a confirmation page if your request was successfully processed

## **Telephone Requests**

- Contact the IRS by calling **1-800-908-9946**
- Follow the prompts to enter in your social security number and street address.
- Select "option 2" to request an IRS Tax Return Transcript and the appropriate year. For the 2016-2017 academic year, you will want to select the 2015 tax year.

**\*If successfully validated, you can expect to receive a paper IRS Tax Return Transcript at the address used in the phone request within 5-10 business days from the time the online request was successfully transmitted.\***