

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

The IRS DRT can be used by both students and parents

Instructions to use the IRS DRT:

1. Log in to your current FAFSA, or start a new FAFSA at www.fafsa.gov.
2. In the financial 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. This will take you to the IRS website, where you’ll need to log in by providing your name and other information exactly as you provided it on your tax return.
4. At the IRS site, you can preview your information before agreeing to have it transferred to your FAFSA.
5. Check the “Transfer My Tax Information into the FAFSA” box, and click the “Transfer Now” button and you will be returned to the FAFSA website.
6. On the FAFSA, you’ll see that questions that are populated with tax information will be marked with “Transferred from the IRS.”
Don’t make any changes to those answers (except where Individual Retirement Account or pension rollovers are involved), or you’ll invalidate the information you retrieved.
7. Review your federal tax return information that has been transferred into the data fields on your FAFSA.

The following individuals are not eligible to use the IRS DRT for 2017-2018:

- Anyone who has a federal filing status of Married Filing Separately
- Anyone who is married and filed Head of Household
- The parents’ marital status is “Unmarried and both parents living together”
- Anyone that has filed an Amended 1040X federal tax return (Form 1040X is used to correct your original tax return)
- Anyone that has filed a Puerto Rican or foreign tax return
- Anyone with a FAFSA marital status date of January 1, 2016 or later
- Parents with all zeroes for Social Security numbers or first 3 digits are 666
- Victims of IRS- tax-related Identity theft
- Anyone who indicates they have not already filed a tax return or will not file a tax return

Any students or parents who are not eligible to use the IRS DRT will need to enter their tax return information manually onto the FAFSA.