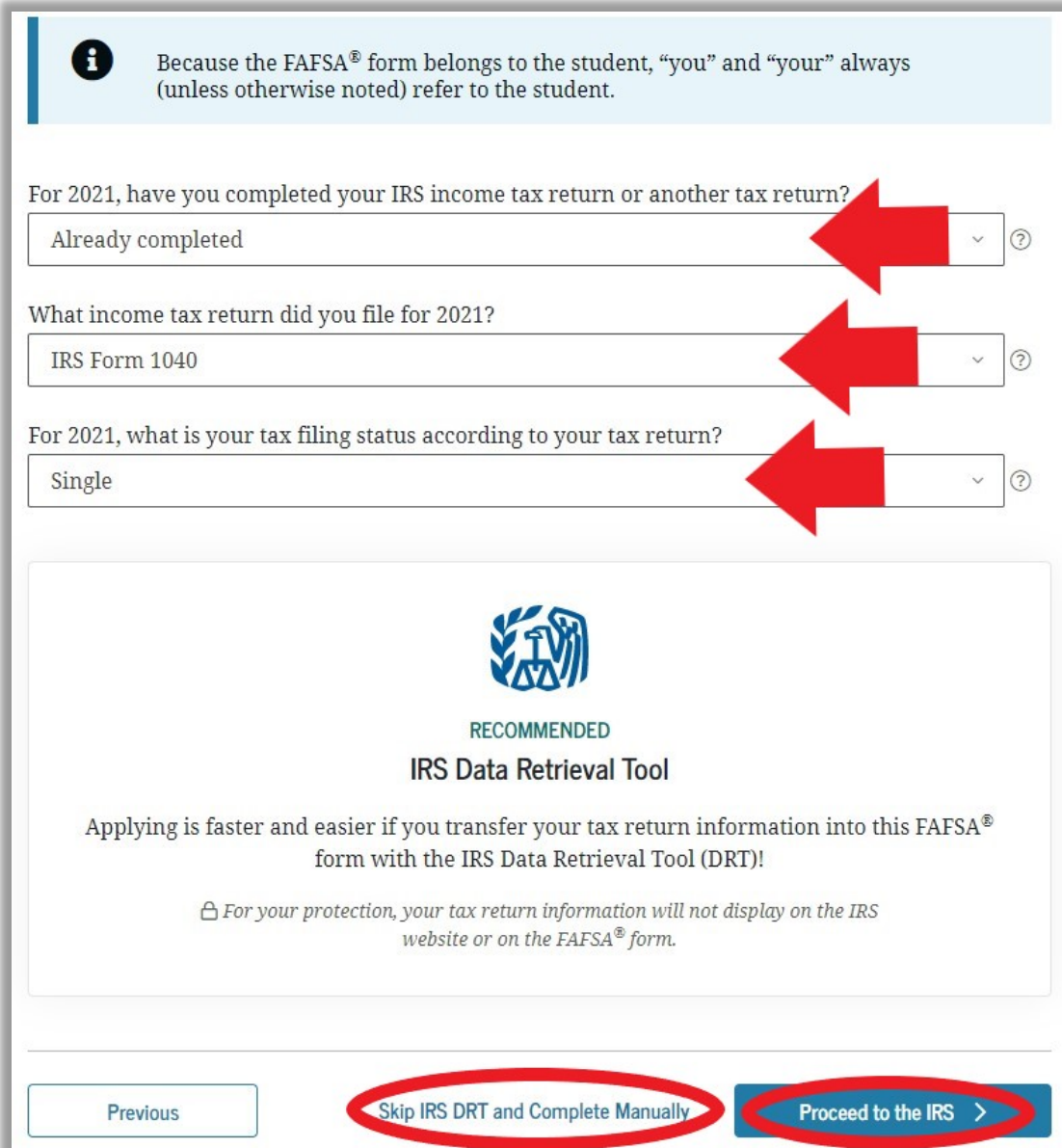


## Guide for using the IRS DRT on the 2023-2024 FAFSA

The **IRS Data Retrieval Tool** (IRS DRT) allows students and parents who filed a U.S. tax return with the Internal Revenue Service (IRS) to access the IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA®) and to transfer the data directly into their FAFSA application.

Not everyone will be able to use this process due to a variety of different reasons. You may need to manually enter the tax information on your FAFSA.




**i** Because the FAFSA® form belongs to the student, “you” and “your” always (unless otherwise noted) refer to the student.


For 2021, have you completed your IRS income tax return or another tax return?  
Already completed

What income tax return did you file for 2021?  
IRS Form 1040

For 2021, what is your tax filing status according to your tax return?  
Single

  
**RECOMMENDED**  
**IRS Data Retrieval Tool**

Applying is faster and easier if you transfer your tax return information into this FAFSA® form with the IRS Data Retrieval Tool (DRT)!

 For your protection, your tax return information will not display on the IRS website or on the FAFSA® form.

Previous   **Skip IRS DRT and Complete Manually**   **Proceed to the IRS >**

On the FAFSA you should be in the “Financials” section of the FAFSA, enter the tax filing information and click on “Proceed to the IRS.”

## Guide for using the IRS DRT on the 2023-2024 FAFSA

STUDENT INFORMATION

### Student Leaving Your FAFSA® Form

You have entered answers to one or more income questions. Your FAFSA form will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA form.

You are now leaving your FAFSA form and will be transferred to the IRS website to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA form will automatically open either when you transfer your information from the IRS or choose to return to your FAFSA form from the IRS website. If you do not transfer your information or choose not to return to your FAFSA form from the IRS website, you will have to log in to open your saved FAFSA form.

[Skip IRS DRT and Complete Manually](#) [Proceed to the IRS](#)

A popup will ask you if you want to leave the page. Click “OK” to go to the IRS website and continue the process.

[Close X](#)

You are now leaving this page. Select "OK" to continue or select "Cancel" to stay on this page. Your FAFSA information will be saved if you choose to continue.

[Cancel](#) [OK](#)

 [Return to FAFSA](#) | [Help](#) | [Logout](#) | [Español](#)

**THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!**

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY! Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

[OK](#)

## Guide for using the IRS DRT on the 2023-2024 FAFSA

The screenshot shows the IRS DRT interface for the 2023-2024 FAFSA. At the top, the IRS logo is on the left, and navigation links for 'Return to FAFSA', 'Help', 'Logout', and 'Español' are on the right. The main heading is 'Get My Federal Income Tax Information', followed by a link to the 'Privacy Notice'. The instruction 'Enter the following information from your 2021 Federal Income Tax Return.' is displayed, along with a note that all fields are required unless marked otherwise. The form contains several input fields: 'First Name', 'Last Name', 'Social Security Number' (with a 'No input required' note), 'Date of Birth' (with a 'MM/DD/YYYY' format note and a calendar icon), 'Filing Status' (a dropdown menu currently showing 'Single'), and 'Street Address' (with a note to 'Must match your 2021 Federal Income Tax Return'). Red arrows are overlaid on the form, pointing to each of these input fields to indicate where the user should enter their information.

Some of the information will already be filled in. You need to make sure that everything matches the information on your 2021 federal tax return. This includes all capitalization, spaces, and abbreviations in the address. If you do not have a PO Box or Apartment number leave those spaces blank.

## Guide for using the IRS DRT on the 2023-2024 FAFSA

**Apartment Number**  
Required if entered on your tax return

**Country**  
United States

**City, Town or Post Office**

**State / U.S. Territory**  
Select One

**ZIP Code**  
52240

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

**SUBMIT**

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

**CANCEL**

IRS | [IRS Privacy Policy](#) | [Accessibility](#)

Once everything is filled in correctly, click on “SUBMIT.”

## Guide for using the IRS DRT on the 2023-2024 FAFSA

The screenshot shows the IRS DRT interface. At the top is the IRS logo and navigation links: "Return to FAFSA", "Help", "Logout", and "Español". The main heading is "2021 Federal Income Tax Information". Below this, there is explanatory text about the data transfer process. A table lists the types of tax information that will be transferred. At the bottom, there are two options: "Transfer My Tax Information into the FAFSA Form" (which is selected with a checked box and a "TRANSFER NOW" button) and "Do Not Transfer My Tax Information and Return to the FAFSA Form" (which is unselected with an unchecked box and a "DO NOT TRANSFER" button).

**2021 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	Untaxed Portion of IRA Distributions & Pensions/Annuities
Name(s)	Adjusted Gross Income	Tax-exempt Interest Income
Social Security Number	Income Earned from Work	IRA Deductions and Payments
Filing Status	Income Tax	Status of Amended Returns Received
IRS Exemptions	Education Credits	Schedule 1 Evaluation

Refer to your tax records if you have a question about the values you reported.

**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.

☒ **TRANSFER NOW** ?

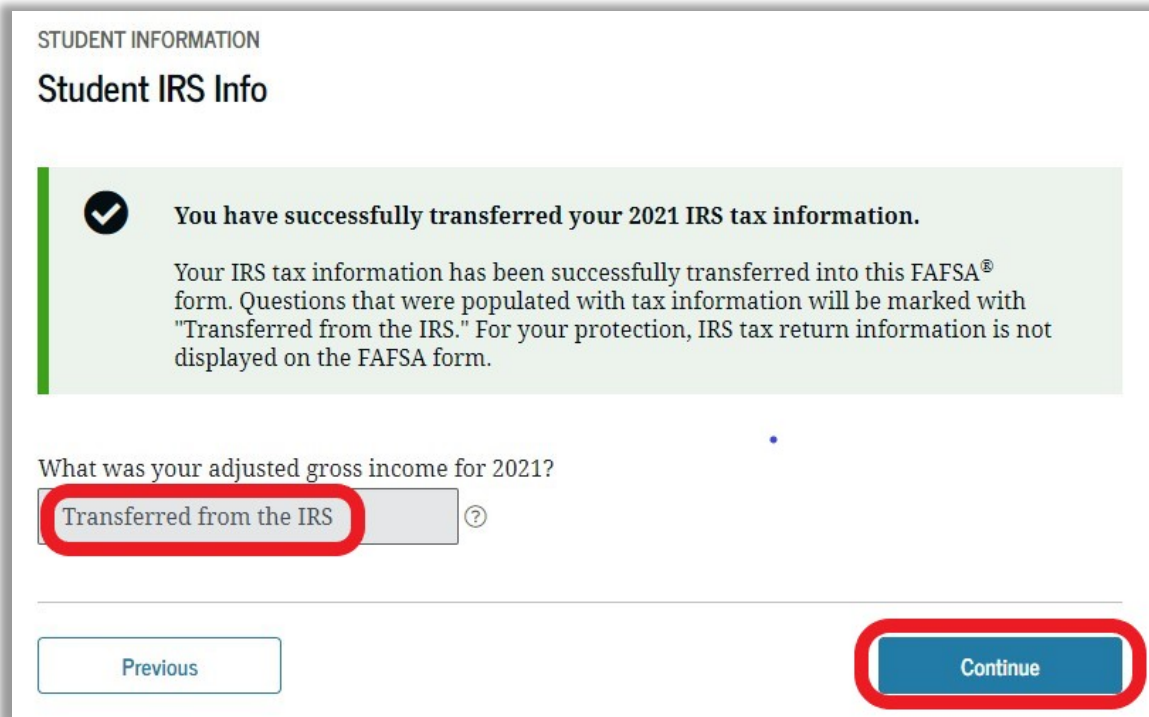
**Do Not Transfer My Tax Information and Return to the FAFSA Form** ?

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.

☐ **DO NOT TRANSFER** ?

If the IRS tax data is located and can be transferred, you will see the screen shown above. Check the first box and then click the “TRANSFER NOW” button next to it.

## Guide for using the IRS DRT on the 2023-2024 FAFSA



The screenshot shows the 'STUDENT INFORMATION' section of the FAFSA form, specifically the 'Student IRS Info' page. A green banner at the top contains a checkmark icon and the text: 'You have successfully transferred your 2021 IRS tax information. Your IRS tax information has been successfully transferred into this FAFSA® form. 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 form.' Below this, the question 'What was your adjusted gross income for 2021?' is displayed. The answer field shows 'Transferred from the IRS' with a red circle around it and a question mark icon to its right. At the bottom, there are two buttons: 'Previous' on the left and 'Continue' on the right, with the 'Continue' button highlighted with a red circle.

STUDENT INFORMATION

Student IRS Info

✓ You have successfully transferred your 2021 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA® form. 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 form.

What was your adjusted gross income for 2021?

Transferred from the IRS ?

Previous Continue

Do not close the tab or your browser. It may take a minute or two for the process to work. Once the transfer is complete, it should take you to the page that asks, “What was your adjusted gross income for 2021?” Directly below that question should say, “Transferred from the IRS.” You can then click on “Continue” to complete the rest of your FAFSA.

Limited information is transferred using the IRS DRT process. You may still need to provide tax data such as Income earned from work.