



2023-2024 IRS Data Retrieval Tool Instructions

The IRS Data Retrieval Tool (IRS DRT) Electronically Transfers Your Federal Tax Return Information Into Your FAFSA Form. It can be used by both students and parents.

WHY

EASY: Transfer info with the click of a button.

FAST: Instantly retrieve your information.

ACCURATE: Correctly fill in your information.

HOW

1. Log in to your current FAFSA form or start a new application at <https://studentaid.gov/h/apply-for-aid/fafsa> for the 2023-2024 school year.
2. In the finances section of the online form, you will see a “Link to IRS” button if you are eligible to use the IRS DRT.
3. Click the “Link to IRS” button and log in with your *FSA ID* to be transferred to the IRS to retrieve your info.
4. Once at the IRS site, enter your information exactly as it appears on your 2021 federal income tax return and click the “Submit” button.
5. Check the “Transfer My Tax Information into the FAFSA form” box, and click the “Transfer Now” button.
6. You will know that your federal tax return information has been successfully transferred because the words “Transferred from the IRS” will display in place of the IRS information in your FAFSA form.
7. If the transfer is successful, please do not forget to sign and submit your FAFSA even if you have done so previously.

For your protection, your tax information will not be displayed on either the IRS site or <https://studentaid.gov/h/apply-for-aid/fafsa>.

The successful use of the IRS Data Retrieval Tool will be accepted in place of the IRS Tax Transcript.

If you have any questions or need assistance please contact the IRS at 1-800-829-1040 or visit studentaid.gov/irsdrv.