

IRS Data Retrieval Tool (DRT)

What is the IRS Data Retrieval Tool?

The IRS Data Retrieval Tool allows a student (and their parents, if dependent) to retrieve financial information necessary to complete the FAFSA directly from the IRS.

Why use the IRS Data Retrieval Tool?

By using the IRS Data Retrieval:

- Most financial information questions on the application are answered by importing information
- Financial Information reported on the FAFSA is accurate
- If selected for a process called verification, copies of tax return transcripts will **not** be required

Who is eligible to use the IRS Data Retrieval Tool?

In order to be eligible to use the IRS Data Retrieval Tool, an individual (student or parent) must:

- Have completed a tax return for the 2014 tax year
- **Not** file taxes as "Married Filing Separately" or "Head of Household"
- **Not** have filed an amended tax return
- **Not** have filed a Puerto Rican or foreign tax return
- **Not** have filed taxes recently (within the last 3 weeks if filed electronically; within the last 11 weeks if filed by mail)

Eligible individuals will be prompted to provide their FAFSA PIN and select "Link To IRS" to begin using the tool.

Student Financial Information

Application was successfully saved.

For 2014, have you completed your IRS income tax return or another tax return?

For 2014, what is your tax filing status according to your tax return?

You may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.

Did you file a Form 1040X amended tax return?
 Yes No

Did you file a Puerto Rican or foreign tax return?
 Yes No

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
 Yes No

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

[LINK TO IRS](#)

Help and Hints

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?

If you filed your taxes electronically within the last three weeks, or by mail within the last eleven weeks, select **Yes**; otherwise, select **No**.

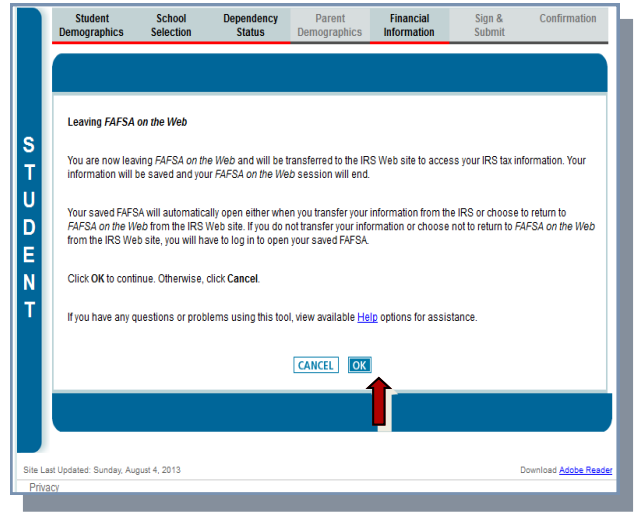
If you filed your taxes electronically within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#); however, if you are not able to transfer your tax return information into your FAFSA at this time, you can try again in a week or two or



IRS Data Retrieval Tool (DRT)

How do I use the IRS Data Retrieval Tool

After being determined to be eligible to use the IRS Data Retrieval Tool, the applicant will be notified they are being transferred to the IRS website and to select "OK" to continue.



The screenshot shows the IRS.gov 'Get My Federal Income Tax Information' form. The form is for the 2014 Federal Income Tax Return. It includes the following fields:

- First Name *
- Last Name *
- Social Security Number * (pre-filled with *** - ** - 6644)
- Date of Birth *
- Filing Status * (pre-filled with Married-Filed Joint Return)
- Address - Must match your 2014 Federal Income Tax Return. ?
 - Street Address *
 - P.O. Box (Required if entered on your tax return) ?
 - Apt. Number (Required if entered on your tax return)
 - Country * (pre-filled with United States)
 - City, Town or Post Office *
 - State/U.S. Territory * (pre-filled with Select One)
 - ZIP Code *

At the bottom, there are two buttons: 'Return to FAFSA' and 'Submit'. A red arrow points to the 'Submit' button.

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

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.

[IRS Privacy Policy](#)

Provide the following demographic information:

- Filing Status
- Address including City, State, Country and Zip Code (Note: This information must match what appears on the completed tax return.)

If the tax filer has moved since completing taxes, use the address listed on the tax return.

Select "Submit" to process



Northern Illinois University

IRS Data Retrieval Tool (DRT)

Review the financial information then check the box labeled "Transfer My Tax Information into the FAFSA" and select "Transfer now."

Student 2014 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers
Tax Year	2014	
Name(s)	John and Jane Doe	
Social Security Number	*** - ** - 1234	
Filing Status	Married-Filed Joint Return	Question 34 on the FAFSA
Type of Tax Return Filed	1040	Question 33 on the FAFSA
Adjusted Gross Income	\$50,000	Question 36 on the FAFSA
Income Earned From Work	\$50,000	Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Student: Question 39 on the FAFSA and/or Spouse: Question 40 on the FAFSA
Income Tax	\$0	Question 37 on the FAFSA
IRS Exemptions	3	Question 38 on the FAFSA
Education Credits	\$0	Question 44a on the FAFSA
IRA Deductions and Payments	\$0	Question 45b on the FAFSA
Tax-Exempt Interest Income	\$0	Question 45d on the FAFSA
Untaxed IRA Distributions	\$0	Question 45e on the FAFSA
Untaxed Pensions	\$0	Question 45f on the FAFSA

Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

Do not Transfer My Tax Information and Return to the FAFSA

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. You may still use this tax information to input the data into your FAFSA.

[IRS Privacy Policy](#)

The applicant will be notified upon success and returned to the FAFSA

Application was successfully saved.

- You're almost done. You transferred your IRS tax information, and questions that were populated are marked with "Transferred from the IRS." To finish, you must sign and submit this application and receive a confirmation page.

If the attempt is not successful the Tool will notify the applicant

The address you entered does not match our records.

What went wrong?

- Your address may have changed.** Your current address may not be the same as the address we have on record for you. Use the address that matches your 2012 Federal Income Tax Return. Don't forget to include your apartment number if applicable.

Financial Information transferred from the IRS will include "Transferred from the IRS" next to the amount. While students may edit the imported amounts it is not recommended and may result in requesting documentation if the student is selected for verification.

IRS 1040

What was your (and your spouse's) adjusted gross income for 2014? This amount is found on IRS Form 1040-line 37.

\$ 50,000 .00 Transferred from the IRS

