



2022-2023 Step-By-Step DRT Instructions

Please refer to the step-by-step instructions below to utilize the Data Retrieval Tool (DRT), when completing your 2022-2023 FAFSA application on the web. If you are a dependent student and need to transfer your parent(s)' 2020 tax information as well, the instructions will work similarly when transferring the parent(s)' information.

You will be able to utilize the DRT tool when you reach the "Financial Information" tab in your 2022-2023 FAFSA application. Please make sure the following 3 questions are answered to use the DRT tool.

****Please note** your 2020 tax return will need to be **already completed** and processed by the IRS to use the DRT tool:

If you are eligible to use the DRT tool, the **Link to IRS** option will appear:

Click **Link to IRS**

Help and Hints

Did you file a Puerto Rican or foreign tax return?

If you filed a Puerto Rican or foreign tax return, select **Yes**; otherwise, select **No**.

You are not eligible to use the [IRS Data Retrieval Tool](#) if you filed a Puerto Rican or foreign tax return.

Related Topics:

[Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.?](#)

On the next screen, please enter your FSA ID login information:

Then, click **Proceed to IRS Site**

Help and Hints

What is your (the student's) FSA ID Username or Verified E-mail Address?

You **must** enter your FSA ID username. If you have verified the e-mail address on file with your FSA ID, you may use it instead of your username to access the IRS Web site and request your income tax information.

If you do not already have an FSA ID, you can [create an FSA ID](#).

If you have an FSA ID but do not remember your username or verified e-mail address, click [Forgot Username](#).

Note: Your FSA ID e-mail address may be different from your FAFSA e-mail address.

When you arrive at IRS.gov, a consent to monitoring message from the Internal Revenue Service will appear.

To continue with the data transfer, click **OK**

The screenshot shows the IRS.gov website header with the IRS logo and navigation links: "Return to FAFSA | Log Out | Help" and "Español". The main heading is "Get My Federal Income Tax Information". Below it, there is a link to the "Privacy Notice" and a note that certain fields are "Required". The form contains the following fields: First Name, Last Name, Social Security Number, Date of Birth (with "1987" visible), Filing Status, and Address (Street, P.O. Box, Apt. Number, Country, City/Town/Post Office, State/Territory, ZIP Code). A modal dialog box titled "Message from webpage" is overlaid on the form, containing a warning icon and the text: "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)." An "OK" button is at the bottom of the dialog. A blue arrow points to the "OK" button. At the bottom of the page are "Return to FAFSA" and "Submit" buttons.

Your First/Last name, last 4 of SSN #, DOB, and 2020 filing status information will be visible on your screen.

You will need to enter the street address **exactly** the way it was reported on the filer(s) 2020 tax return, in order to be located by the IRS.

When you are finished entering the address information, click **Submit:**

This screenshot is identical to the one above, but with several blue arrows pointing to the address-related fields: Street Address, P.O. Box, Apt. Number, Country (set to "United States"), City/Town/Post Office, State/U.S. Territory (set to "Select One"), and ZIP Code. The "OK" button from the dialog box is no longer present. The "Submit" button at the bottom right is also highlighted with a blue arrow. The "Return to FAFSA" button is at the bottom left. A link for "IRS Privacy Policy" is located at the bottom center of the page.

On the next screen, the IRS will confirm that they have located your **2020** income tax return information.

You will need to check the box for the first option Transfer My Tax Information into the FAFSA Form, and then click Transfer Now to initiate the data transfer.

When the data is successfully transferred, you will receive a confirmation message on the next screen.

Please refrain from changing any student, and/or parent, tax information going forward.

You can then answer the dislocated worker question, and hit Next to sign and complete your 2022-2023 FAFSA application.

****Please note that if you are not able to use the DRT tool, you will need to manually enter you and/or your parent(s)' 2020 tax information, using a 2020 tax return copy.**