FAFSA - IRS Data Retrieval Tool (DRT)

While completing your FAFSA on the Web (FOTW) at FAFSA.gov, applicants and parents of dependent applicants who indicate they have filed or will file a federal tax return will be directed to use the IRS Data Retrieval Tool (DRT), which provides them the ability to electronically transfer their income information directly from the IRS to the FAFSA.

Contact Us For More Info

University of Northwestern – St. Paul
Financial Aid Office
FinancialAid@unwsp.edu,
(651) 631-5212,
toll free (866) 853-2455,
or visit our office,
1st floor Nazareth Building

UNW FAFSA CODE
002371

Benefits of using the Tool

- Applicants can complete the FAFSA more quickly and accurately.
- DRT speeds up awarding process by reducing errors and minimizing chances of being selected for verification.
- Applicants who completed their FAFSA using estimated income values from W-2's and those selected for verification can use the DRT to update their income information and avoid unnecessary processing delays.

Important Dates to Remember

- January 1– students may begin to submit their FAFSA applications at FAFSA.gov
- February – FAFSA IRS DRT access available at FAFSA.gov
- File your and your parent's or spouses' Income Tax Form 1040 at least 2 weeks before completing the FAFSA.

When will my submitted tax return data be available to the IRS Data Retrieval Tool?

- E-filed Tax Returns Electronically – IRS Tax data will be available using DRT within 2 weeks
- Paper Tax Returns Submitted by Mail – IRS Tax data will be available using DRT within 6 – 8 weeks

What if my FAFSA is selected for Verification?

If your FAFSA record is selected for verification, and you and/or your parents were eligible to file a federal tax return, you will be required to provide income verification information to the Financial Aid office by:

- Making a "Correction" to your FAFSA, and using the DRT to update your and/or your parents or spouse income **(OR)**
- You and/or your parents or spouse may request a "**Tax Return Transcript**" from **IRS.gov**, and send it to the University of Northwestern Financial Aid Office at the address listed above.

Who is NOT eligible to use the IRS Data Retrieval Tool?

- Married couples who file separate tax returns
- Applicants whose marital status has changed as of January 1st
- Applicants who are neither eligible nor required to file a Federal Tax Return.

Accessing the IRS Data Retrieval Tool

START HERE GO FURTHER FEDERAL STUDENT AID

FAFSA Free Application for Federal Student Aid

Contact Us | Browse Help | SEARCH

Student Demographics | School Selection | Dependency Status | Parent Demographics | Financial Information | Sign & Submit | Confirmation

STUDENT

Student Tax Information

Application was successfully saved.

For 2011, have you completed your IRS income tax return or another tax return?
Already completed

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

Check all that apply or check **None of the above**

- My tax filing status is Married Filing Separately
- My tax filing status is Head of Household
- I filed an amended tax return
- I filed a Puerto Rican or foreign tax return
- I recently filed my taxes
- None of the above

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA.

Enter your PIN and click **Link To IRS**

What is your PIN?

I forgot/don't know My PIN

LINK TO IRS

PREVIOUS | NEXT

NEED HELP? | SAVE | CLEAR ALL DATA | VIEW FAFSA SUMMARY | EXIT

Help and Hints

None of the above

Under certain conditions, students are not eligible to use the IRS Data Retrieval Tool, which allows users to link to the IRS Web site and securely transfer IRS tax return information into their FAFSA. If you meet any of these conditions, you will not be presented with the option to link to the IRS.

Select the check boxes that describe your (and if married, your spouse's) tax filing status, or select **None of the Above**.

Select **My tax filing status is Married Filing Separately** if you are married, but you and your spouse filed separate tax returns. (Note:

On the FAFSA under the Student (example shown here) or Parent Financial Information tab, you will be asked questions to determine whether or not you (or your parents) are eligible to use the tool.

ALL applicants (or parents) who indicate they have filed a federal tax return will be directed to use the IRS Tool.

Applicants (or parents) who indicate they will file a federal tax return will receive emails directing them to make a correction to their FAFSA by using the IRS Tool to update their income information once they have filed their federal income tax return.

IRS.gov

Return to FAFSA | Log Out | Help

Parent <YYYY> 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	<2008>	
Name (s)	<Joe & Jane Smith>	
Social Security Number	<***-**-6789>	
Filing Status	<Married-Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question<##> on the FAFSA
Adjusted Gross Income	<$126,721>	Question<##> on the FAFSA
Income Tax	<$31,400>	Question<##> on the FAFSA
IRS Exemptions	<5>	Question<##> on the FAFSA
Education Credits	<$2,500>	Question<##> on the FAFSA
IRA Deductions and Payments	<$2,500>	Question<##> on the FAFSA
Tax-Exempt Interest Income	<$2,500>	Question<##> on the FAFSA
Untaxed IRA Distributions	<-$2,500>	Question<##> on the FAFSA
Untaxed Pensions	<-$2,500>	Question<##> 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.

Transfer Now

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.

Do Not Transfer

When transferred to the IRS page, check the box and select Transfer Now to move applicable IRS tax information into the FAFSA.