

**2023-2024 Instructions for Completing IRS Data Retrieval After You Have Filed the FAFSA
(Successful Completion Will Satisfy the Tax Return Requirement)**

It is **strongly recommended** that students opt to use the **IRS Data Retrieval option** during the initial FAFSA or when corrections are made to a 2023-2024 FAFSA application. This option will streamline the processing of the financial aid application and will take the place of a Signed Tax Return for students selected for verification.

Eligibility Requirements for the IRS Data Retrieval Tool

Step #1:

Determine whether student and/or parent are eligible to use the IRS Data Retrieval Tool (IRS DRT) by considering the following:

It is important to note that to successfully use the IRS DRT, you must have both:

- A valid Social Security Number and legal name to match and
- Filed a 2021 Federal Tax Return

Also:

If Any of These Apply to you:	<ul style="list-style-type: none"> • Applied for a 2021 Federal Tax Filing Extension • Filed a Puerto Rican or foreign tax return • Filed return using a Tax ID Number (TIN) • Tax Return Transcript not obtainable due to Victim of IRS Identity Theft • Filed “Married Filed Separately” • Filed “Married Filing Head of Household” • Marital status from 1/1/2022 through 5/11/2023 has changed 	Then.... You may NOT be eligible to use the IRS DRT.
--------------------------------------	---	---

Step #2

Once you have determined if you are eligible to use the IRS DRT:

- Go to <https://studentaid.gov/h/apply-for-aid/afsa>
- If you filled out the FAFSA previously, click on "Log In" otherwise click on "Start Here".
- Student will need to log in using their FSA ID.
- Click on the 2023-2024 tab to complete the 2023-2024 FAFSA.
- Navigate to the income section for the student and/or parent (if dependent student).
- Mark “Already Completed” when asked about the status of your 2021 federal return.
- Select the tax filing status.
- Choose “Link to the IRS” (Parent will need to use their FSA ID to link to the IRS).
- Once on the IRS DRT website, you and your parents (if applicable) will proceed through the usual authentication process and once authenticated, will be provided a list of all the possible fields from a tax return that could transfer back into the FAFSA form. However, you and parents will NOT be able to view your tax return information on the IRS DRT web page. If you or your parents agreed to transfer your data back into the FAFSA form, you will also not be able to view the transferred income tax information on the FAFSA web pages. Instead of transferred information, you will see the words “Transferred from the IRS” in the data entry fields through the online FAFSA form and on the Student Aid Report (SAR). The transferred information will still be sent to the schools and state grant agencies.
- When you use the IRS Data Retrieval Tool, you will receive a notice (CP302) from the Department of Treasury, Internal Revenue Service. This is notification that your tax data was accessed through the FAFSA website.