

IRS Data Retrieval Tool (DRT) for FAFSA

The IRS Data Retrieval Tool (DRT) allows students and parents to transfer tax return information directly into the FAFSA. This simplifies the Financial Information section and satisfies the "Tax Return Transcript" requirement for students selected for verification by the Department of Education.

TIP: Have a copy of your tax return in front of you when you attempt to use the DRT. Your name and address must be entered EXACTLY as on the return to get a database match.

NOTE: Dependent status for FAFSA is not the same as for the IRS. **Students under 24** must provide parent financial information unless the student can **document** one of the **specific exclusions** the FAFSA asks about, such as if the student is married or an emancipated minor. Information from the FAFSA is used by schools to offer financial aid. Providing financial information on the FAFSA does not obligate the student or the parent to anything.

1) Go to STUDENTAID.GOV

□ Click on Fill Out A FAFSA Form (once per academic year), then select Start Here or Login (to complete a FAFSA in progress or update a previously submitted FAFSA).

□ **Student:** Log in on the left-hand side with your FSA ID. (If you don't have an FSA ID, Click on Create an FSA ID).

□ Create a Save Key (easy, temporary password that allows you or your parent to log back into this particular FAFSA).

□ **Parent (in a different location from the student):**
Log in on the right-hand side. When prompted, enter your student's information and the Save Key created for this FAFSA. Do not log in with your student's FSA ID (considered to be their legal signature) or your own FSA ID (unless you want to apply for financial aid for yourself).

2) Access the DRT under the Financial Information Tab

□ **New FAFSA (not yet submitted):** You will get to the Financial Information tab after you have answered questions about Student Demographics, School Selection, Dependency Status, and Parent Demographics (for dependent students). □ *On the school selection page (right-hand side), enter 002530 and add MSU Billings.*

*****Dependent students:** If asked if you **want to skip** questions about parents or yourself, say **"No."** Answer the questions. You may not be able to access the DRT if you skip questions. Your FAFSA may be incomplete.

- **Previously Submitted FAFSA:** □ Click on the link that says **Make FAFSA Corrections.**
- Click on the **Financial Information** tab.

3) Answer the following questions about your tax return in the FAFSA

Parents (if applicable) will answer the same questions in the Parent Tax Information section.

□ When asked if you if you completed your IRS income tax return, select **"Already Completed."** Select the **tax filing status** indicated on your tax return.

□ You must answer **"No"** to these questions to access the DRT.

- **Did you file a Puerto Rican or foreign tax return?**

□ If the answer to any of the questions is "yes," see **If the DRT Does Not Work** on the next page.

4) Link to the IRS

□ If eligible to transfer your tax return, click on **"LINK TO IRS"** in the blue box.

In the Parent Financial Section (if applicable) Parent will be prompted to enter their FSA ID in order to link to the IRS and access the DRT

□ A window will open that says **"Leaving FAFSA on the Web."** Click on **"PROCEED TO IRS SITE."**

The screenshot shows the 'STUDENT INFORMATION' section of the FAFSA form. It includes several informational messages and questions:

- An information message: "Because the FAFSA belongs to the student, 'you' and 'your' always (unless otherwise noted) refer to the student."
- An attention message: "Attention! You must provide financial information from your 2017 tax return on the following pages."
- A question: "For 2017, have you completed your IRS income tax return or another tax return?" with a dropdown menu set to "Already completed".
- A question: "For 2017, what is your tax filing status according to your tax return?" with a dropdown menu set to "Single".
- A question: "Did you file a Puerto Rican or foreign tax return for 2017?" with radio buttons for "Yes" and "No" (selected).
- The "IRS Data Retrieval Tool" section, which includes a blue button labeled "LINK TO IRS" with a right-pointing arrow.
- Navigation buttons for "PREVIOUS" and "NEXT" at the bottom right.

The screenshot shows a warning window titled "Leaving FAFSA on the Web". It contains the following text:

- "You are now leaving FAFSA on the Web and will be transferred to the IRS Web site. Your FAFSA information will be saved."
- "Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to FAFSA on the Web from the IRS Web site. If you do not transfer your information or choose not to return to FAFSA on the Web from the IRS Web site, you will have to log in to open your saved FAFSA."
- "For your protection, your tax return information will not display on the IRS Web site or on the FAFSA."

 At the bottom, there are two buttons: "SKIP IRS DRT" and "PROCEED TO IRS SITE". The "PROCEED TO IRS SITE" button is circled in blue.

□ You will be redirected to IRS.gov. Click **"OK"** to accept the terms of use and access the IRS website.

The screenshot shows a warning message from the U.S. Government System:

- "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)."

 At the bottom right, there is a button labeled "OK" which is circled in blue.

Enter your name and address into the IRS form **EXACTLY** as they appear on your tax return.

For example, if your return says "Avenue," type "Avenue" and not "Ave." Put a middle initial if you used one for your return. If you moved after you filed your return, use the address you had when you filed.

Tips: For apartments, put the number on the Apt Number line (if indicated by your return). However, if you live in a rural area and used a PO Box for your home address, try entering the PO Box on the Street Address line. Enter the address exactly as it appears on your tax return, even if there is an error.

Click **"Submit."**

5) Review and Transfer Your Tax Return

Review the information. If correct, check the **first box**, **"Transfer My Tax Information into the FAFSA."**

Click on **"Transfer Now."** You will be redirected back to FAFSA.gov.

If you get a "Something Went Wrong" screen, return to FAFSA, go back to the previous questions, and try again. Double-check your name and address.

If the DRT Does Not Work

- If you are filing a new FAFSA, enter information from your tax return into FAFSA. The FAFSA will indicate which line of the tax return has the correct number to enter. Read the Help and Hints in the right sidebar.
- if you were attempting to use the DRT to fulfill a verification requirement, see the next page for instructions on how to get an IRS Tax Return Transcript.

If the DRT Is Successful

If the DRT works, your tax information will be transferred automatically to the FAFSA. The FAFSA questions related to your tax return will indicate **"Transferred from the IRS."**

****If the transfer is successful, you will be unable to answer questions that uses information from the IRS.**

Tax Year	Type of Return Filed	Untaxed Pensions
Name(s)	Adjusted Gross Income	Untaxed IRA Distributions
Social Security Number	Income Earned from Work	Tax-exempt Interest Income
Filing Status	Income Tax	IRA Deductions and Payments
IRS Exemptions	Education Credits	Status of Amended Returns Received

STUDENT INFORMATION

You have successfully transferred your 2017 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS." For your protection, IRS tax return information is not displayed on the FAFSA.

What income tax return did you file for 2017?
Transferred from the IRS

What was your adjusted gross income for 2017?
Transferred from the IRS

6) Complete the FAFSA

Answer any remaining questions in the FAFSA. If you aren't sure what a question means, read the Help and Hints in the right sidebar.

If asked if you want to skip questions, click "no" and answer the questions. If the answer to a question is zero, type "0." This can help you avoid having to submit additional documentation later on.

7) Sign & Submit the FAFSA

Are you a preparer? **No.** (Preparers are paid money to file FAFSA.)

Student Signature. If you logged in with your FSA ID, select Agree and Next which will bring you to the signature page. If you are not logged in, you will need to login.

***** Dependent students:** *If your parent is in another location, wait to submit FAFSA until after your parent has signed.*

Parent Signature. If prompted, enter your FSA ID. Select Agree and click on SIGN (white and blue box).

SUBMIT MY FAFSA NOW (*After signing FAFSA*)

You will get a confirmation email from the Department of Education if your FAFSA was successfully submitted. Allow at least one week for the Financial Aid office to download your FAFSA.

Read and respond to letters, emails and myInfo messages from the Financial Aid office. You may need to submit additional documentation in order for the office to process your FAFSA.

It can take 6-8 weeks after you have turned in any additional required documents to process your FAFSA.

8) IRS Notification Letter

Formal IRS Letter: If the IRS Data Retrieval Tool is successful, a letter is sent from the IRS informing you or your Parent that your tax information was used to complete a FAFSA.

A **separate letter** is sent to each person that utilized the IRS Data Retrieval Tool. The letters are sent to the address on the tax return, so make

sure to complete a change of address with the IRS if you or your Parent have moved since filing your taxes.

Notification of access to the Department of Education's IRS Data Retrieval Tool

We're sending you this notice because your personal information was used to access your federal income tax return information through the United States Department of Education's Free Application for Federal Student Aid (FAFSA) website or the Income-Driven Repayment (IDR) Plans online application. If you requested a transfer of information to the Department of Education for federal student aid purposes, we sent your encrypted tax return information to them using the IRS Data Retrieval Tool.

What you need to do

- If you did **NOT** access this system or request a transfer of information, call us at 800-908-4490, ext. 549.
- If you **DID** access this system or request a transfer of information, you don't need to respond to this notice.

IRS Tax Return Transcript

If you were selected for verification by the Department of Education and could not use the IRS Data Retrieval Tool (DRT), you will need to provide the Financial Aid office with a **Tax Return Transcript** for the year requested.

Please see the following link for instructions to request an IRS Tax Return Transcript:

http://www.msubillings.edu/finaid/pdf/Instructions_for_Requesting_IRS_Tax_ReturnTranscript.pdf

Questions? Contact Financial Aid at 406-657-2188 | finaid@msubillings.edu | www.msubillings.edu/finaid