



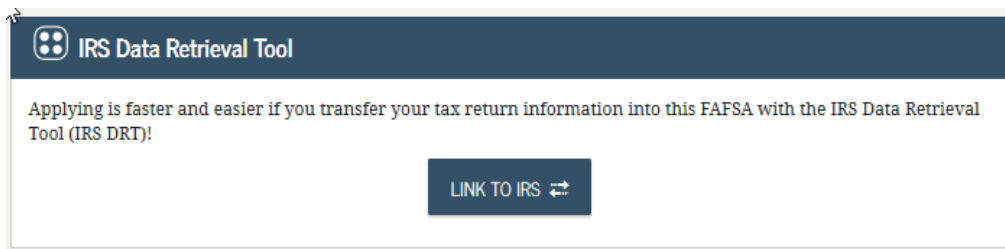
A MEMBER OF THE MINNESOTA STATE COLLEGES & UNIVERSITY SYSTEM
AN AFFIRMATIVE ACTION EQUAL OPPORTUNITY EMPLOYER & EDUCATOR

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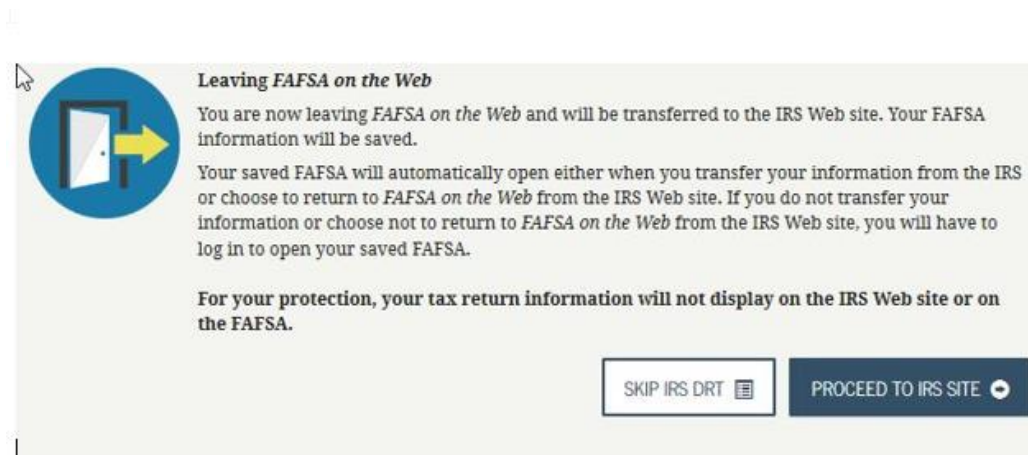
Instructions for IRS Data Retrieval Tool

The IRS Data Retrieval Tool (DRT) is available to anyone that has e-filed their taxes at least 3 weeks earlier, or, in the case of paper filing, 11 weeks earlier. You **must use** the address and your filing status used on your 1040 tax form. To ensure that you are using the correct address, you may want to have a copy of your tax return with you when completing the IRS Data Retrieval process.

1. Log in to <https://studentaid.ed.gov/sa/fafsa>.
2. Click on **"Make FAFSA Corrections."**
3. Click on **"Financial Information"** tab to reach the area where tax information is needed for student taxes. Answer the questions. Once you do so, a blue **"Link to IRS"** button appears. If you are unable to answer "No" to the questions, please get a Tax Return Transcript from the IRS at www.irs.gov/forms-pubs.
4. Next click the **"Link to IRS"** button.



5. The next screen will inform you that you are leaving FAFSA on the Web and you will be transferred to the IRS website. Click **"Proceed to IRS Site"** then **"OK"** to land at the IRS Data Retrieval Tool.



- This screen will have your name, the last 4 of your social security number, your birthdate, and your filing status. You will be asked for your address you used on your taxes. Be precise as this information needs to match for the transfer to work successfully.
- If the information matches, two options will appear at the bottom of the screen. The top option will transfer your tax information directly from the IRS into your FAFSA. The bottom option will decline the transfer. Click the top option, **“Transfer My Tax Information into the FAFSA Form”** and click **“Transfer Now.”**

2017 Federal Income Tax Information

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to 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

Refer to your tax records if you have a question about the values you reported.

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

Transfer My Tax Information into the FAFSA Form ?

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information. **Transfer Now** ?

Do Not Transfer My Tax Information and Return to the FAFSA Form ?

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 form. **Do Not Transfer** ?

[IRS Privacy Policy](#)

- You will be redirected to the FAFSA. You will know that the transfer was successful if you see **“You have successfully transferred your 2017 IRS tax information.”** at the top of the screen.

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.

- Answer the remaining questions then agree to the terms and then click **“SIGN.”** Then click on **“SUBMIT MY FAFSA NOW”** to submit your FAFSA. The FAFSA will arrive in the Financial Aid Office in approximately a week.