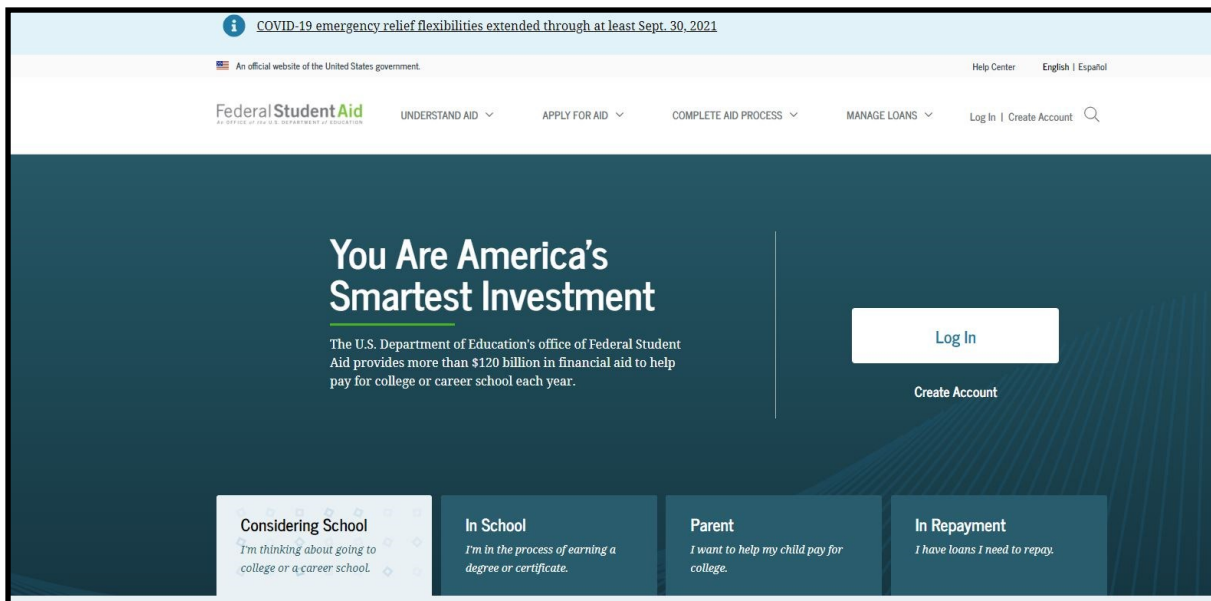# Instructions for Submitting Parent and Student Tax Information

IRS Data Retrieval Tool

The IRS Data Retrieval Tool electronically transfers your federal tax return information into your FAFSA form

1. Log in to your current FAFSA form or start a new application at studentaid.gov.

2. If eligible for the IRS Data Retrieval Tool (IRS DRT) you will click "Proceed to the IRS".

3. Once at the IRS site, you will enter the address information exactly as it appears on your federal income tax return and click the "Continue" button.

4. Check the box next to the "Transfer Now" button and click "Transfer Now" (see example on next page)

2020 Federal Income Tax Information

Shawn M & Kathryn N Yocum

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 Portion of IRA Distributions & Pensions/Annuities
Name(s)	Adjusted Gross Income	Tax-exempt Interest Income
Social Security Number	Income Earned from Work	IRA Deductions and Payments
Filing Status	Income Tax	Status of Amended Returns Received
IRS Exemptions	Education Credits	Schedule 1 Evaluation

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

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** | ?

5. You will know that your federal tax return information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA form.

PARENT INFORMATION
Parent IRS Info

✓ **You have successfully transferred 2020 IRS tax information**

The parents' IRS tax information has been successfully transferred into this FAFSA® form. 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 form.

What was your parents' adjusted gross income for 2020?

Transferred from the IRS ?

Previous | Continue

7. Continue through the FAFSA, digitally sign and submit the FAFSA. The Financial Aid Office will be notified in 1-3 days.