# 2020-2021 Data Retrieval
## Federal Student Aid Programs

Student Financial Services
400 Saint Bernardine Street
Reading, PA 19607
610-796-8201 / 610-796-8336 FAX

Go to https://studentaid.ed.gov/sa/fafsa.

Log in with the student's FSA ID and password. If you are a new user filling out the FAFSA for the first time this academic year, click "Start Here."

- If you are a returning user, having started the FAFSA, saved but not yet submitted it, select "Log in." Then, select "Make FAFSA Correction" and click Next.

Select the "Financial Information" section from the menu bar at the top of the page.



This is the 2020-2021 "Parent Tax Filing Status" view.

Parents who filed amended tax returns are eligible to use the IRS DRT. However, because the IRS is unable to transmit amended tax information, data transferred from the IRS into FAFSA will be the original tax information. Please be aware if you amended your taxes and use the DRT process, you may be asked for additional documentation by the Student Financial Planning office.

- You will be asked if you have completed your 2018 IRS Income Tax Return. You must be able to select "Already Completed" to continue.
- You will be asked the following question: Did you (or your parents) file a Puerto Rican or foreign tax return for 2018? You must be able to answer No to this question to proceed.
- If eligible, click "Link to the IRS."

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## Parent Log In to IRS DRT

| Student Demographics | School Selection | Dependency Status | Parent Demographics | Parent Financials | Student Financials | Sign & Submit | Confirmation |
|---|---|---|---|---|---|---|---|

**PARENT INFORMATION**

You, the parent, should enter the information below and click **Next** to continue. Otherwise, click **Skip IRS DRT**.

If you have any questions or problems using this tool, click FAFSA Help for assistance.

### Provide Parent's FSA ID

Which parent are you?
● Parent 1    ○ Parent 2

Parent's FSA ID Username, E-mail Address, or Mobile Number

parenttest612

Forgot Username | Create an FSA ID

Parent's FSA ID Password

••••••••

Forgot Password

SKIP IRS DRT      NEXT ●

2020-2021 "Parent Log In to the IRS DRT" view.

This is a new view asking which parent will be accessing the IRS DRT.

- Enter the Parent 1 or Parent 2 FSA ID and password

Students will be able to access the data retrieval process without the FSA ID and password if entered at login, otherwise it will need to be entered on this page.

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- Click "Proceed to IRS Site."

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You will receive a prompt stating that you are now leaving FAFSA on the Web.

- Click OK.



You will receive a prompt stating that you are now using and entering a Government website.

- Select OK.

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## Get My Federal Income Tax Information

See our Privacy Notice regarding our request for your personal information.

**Enter the following information from your 2018 Federal Income Tax Return.** ⑦

All fields are required unless marked otherwise.

**First Name**

> Jane

**Last Name**

> Austin

**Social Security Number**
No input required

> *** - ** - 8019

**Date of Birth**
MM/DD/YYYY

> 01/01/1950

**Filing Status** ⑦

> Married-Filed Joint Return ⌄

**Street Address** ⑦
Must match your *2018* Federal Income Tax Return

> 

**P.O. Box** ⑦
Required if entered on your tax return

> 

**Apartment Number**
Required if entered on your tax return

> 

**Country**

> United States ⌄

**City, Town or Post Office**

> FSA

**State / U.S. Territory**

> Massachusetts (MA) ⌄

**ZIP Code**

> 12345 ✕

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

**SUBMIT**

Select the button below to exit the IRS system and return to your FAFSA.

**CANCEL**

- Review the prefilled information and make sure that the first name, last name, social security number and date of birth are correct
- Select the appropriate filing status if not filled in
- Enter the address EXACTLY as it is shown on your tax return (word for word, abbreviation for abbreviation, any punctuation (such as a period) after abbreviation, case sensitive)

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- Select "Submit."
- Please note that you have 3 attempts to enter this information. If you do not move to the next screen after you enter your information for the first time, you will have 2 attempts left. Double-check your information to make sure it matches your tax return.

If the information matches and can be transferred, you will now see a summary page of the information that will be transferred into the FAFSA

- Scroll to the bottom of the page.
- Check the box to the left of the "Transfer Data to FAFSA" options.
- Select "Transfer Now."

## 2018 Federal Income Tax Information

Jane Austin

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 | |

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

**Transfer My Tax Information into the FAFSA Form** ⑦

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.
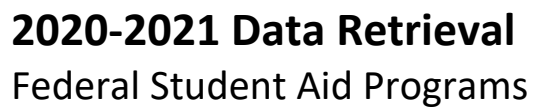
[ ] **TRANSFER NOW** ⑦

**Do Not Transfer My Tax Information and Return to the FAFSA Form** ⑦

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** ⑦

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You will receive notification that the data has been successfully transferred and will be directed back to the FAFSA to continue completing the information.  Please note the process for the student income section will be the same for students who have filed a 2018 tax return.