



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."



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

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.



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

Parent Leaving FAFSA

Student Demographics

School Selection

Dependency Status

Parent Demographics


Parent Financials

Student Financials

Sign & Submit

Confirmation

PARENT INFORMATION





Leaving *FAFSA on the Web*

You, the parent, 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.

SKIP IRS DRT 

PROCEED TO IRS SITE 

- Click "Proceed to IRS Site."



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

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

- Click OK.

The screenshot shows the 'Parent Leaving FAFSA' screen. At the top, a progress bar indicates the following steps: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics (checked), Parent Financials (active), Student Financials, Sign & Submit, and Confirmation. The 'PARENT INFORMATION' section is highlighted. It contains a door icon with an arrow pointing right, followed by the text: 'Leaving FAFSA on the Web', 'You, the parent, 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.', and 'For your protection, your tax return information will not display on the IRS Web site or on the FAFSA on the Web site.' A modal dialog box is overlaid on the screen with the text: 'You are now leaving this page. Click "OK" to continue or click "Cancel" to stay on this page. Your FAFSA information will be saved if you choose to continue.' Below the dialog box are 'OK' and 'CANCEL' buttons. In the background, a 'PROCEED TO IRS SITE' button is visible. At the bottom left, it says 'Site Last Updated: Sunday, September 29, 2019'. At the bottom right, it says 'Download Adobe Reader'.

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

- Select OK.

The screenshot shows a white box with a gray border. At the top, it says 'THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!'. Below this, in smaller text, it says: '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, there is a blue button with the text 'OK'.



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

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. [?](#)

All fields are required unless marked otherwise.

First Name


Last Name

Social Security Number

No input required

Date of Birth

MM/DD/YYYY



Filing Status [?](#)

Street Address [?](#)

Must match your 2018 Federal Income Tax Return

P.O. Box [?](#)

Required if entered on your tax return

Apartment Number

Required if entered on your tax return

Country

City, Town or Post Office

State / U.S. Territory

ZIP Code

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)



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

- 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 ?

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.

☐

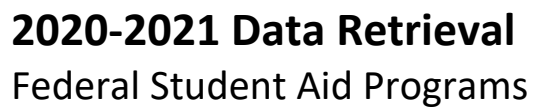
TRANSFER NOW ?

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 ?



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

Parent IRS Info

Student Demographics

School Selection

Dependency Status

Parent Demographics

Parent Financials

Student Financials

Sign & Submit

Confirmation

✓

✓

✓

✓

✎

✓

You have successfully transferred 2018 IRS tax information.

The parents' 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 was your parents' adjusted gross income for 2018?
Transferred from the IRS

◀ PREVIOUS

NEXT ▶

Site Last Updated: Sunday, September 29, 2019

Download [Adobe Reader](#)