2023-24 IRS Data Retrieval Tool Instructions

The IRS Data Retrieval Tool (IRS DRT), available through the Free Application for Federal Student Aid (FAFSA), is the **preferred** method to transfer tax information.

If required to report parent information on the FAFSA, the IRS DRT should be used to correct/verify both the student and parent(s) tax information.

The data being transferred will come from the **2021 IRS Income Tax Return**. Please note that transferred data will be hidden from view and cannot be changed.

If you are ineligible or unable to complete the IRS DRT, submit a 2021 IRS Tax Return Transcript and W-2(s) instead. Instructions to obtain an IRS Tax Return Transcript are available on aurora.edu/forms2023 under reference number B3.

To access and sign the FAFSA, you will need:
- Student FSA ID and password
- Parent FSA ID and password (if dependent)

If you do not have an FSA ID, you will be prompted to do so when accessing the FAFSA.

Log in at FAFSA.gov:
1. As a **returning** FAFSA filer, select the "Login" button.
2. Log in using the **student's** FSA ID and password.
3. Click on "Make FAFSA Corrections."
4. Create a transaction "Save Key" and click "Next."

Parent IRS DRT (if dependent):
1. Go to the "Financial Information" tab - parent.
2. Make sure that the status of the tax return is marked as "Already Completed."
3. Check the type of income tax return filed and the tax filing status.
4. If eligible, click "Link to IRS" to be transferred to the IRS database. Enter the parent FSA ID and password.
5. Enter the address information exactly as it appears on your 1040. Click "Submit."
6. Check the "Transfer My Tax Information into the FAFSA" box.
7. Click the "Transfer Now" button. You will be redirected back to the FAFSA.

Student IRS DRT:
1. Go to the "Financial Information" tab - student.
2. Make sure that the status of the tax return is marked as "Already Completed."
3. Check the type of income tax return filed and the tax filing status.
4. If eligible, click "Link to IRS" to be transferred to the IRS database.
5. Enter the address information exactly as it appears on your 1040. Click "Submit."
6. Check the "Transfer My Tax Information into the FAFSA" box.
7. Click the "Transfer Now" button. You will be redirected back to the FAFSA.

Sign & Submit:
1. Proceed through the remaining sections of the FAFSA.
2. Mark "Agree" to the Terms of Agreement.
3. Enter the student and parent (if dependent) FSA IDs and passwords to sign the FAFSA if required.
4. Click "Submit My FAFSA Now."
5. If you have successfully submitted the FAFSA, a confirmation page will appear and you will receive an email.
6. If you do not receive a confirmation page and email, verify whether you submitted the FAFSA. In some instances, the student may save the FAFSA without submitting it.