How to provide income documentation using the IRS Data Retrieval Tool (DRT)

You’ve been notified by the Financial Aid Office that your FAFSA was selected for verification; this means that you must provide income documentation to the Financial Aid Office to verify that the income information you submitted on your FAFSA is accurate.

The easiest way to provide income documentation is to use the IRS Data Retrieval Tool (DRT). Please follow the steps listed below.

Step 1: Go to your FAFSA at www.fafsa.ed.gov. Click ‘Start A New FAFSA.’

![Image of FAFSA page](image)

Step 2: Log in to your FAFSA. Click ‘Next’ when you’ve finished.

![Image of FAFSA login page](image)

Step 3: Click ‘Make FAFSA Corrections.’
Step 4: Sign in. Enter your 4-digit PIN. If you don’t know or can’t remember your PIN, click the link ‘I forgot / don’t know my PIN’ and follow the instructions. Create and enter a password. Click ‘Next’ when you’ve finished.

Step 5: Click the ‘Financial Information’ tab at the top of the screen. This will allow you to go right to the section that you need to update.

Step 6: Determine if you can use the Data Retrieval Tool (See picture below.)

- The answer to the first question must be ‘Already completed.’ If you have not filed your IRS income tax return, you cannot use the Data Retrieval Tool.
- For the next set of questions, your answer must be ‘None of the above.’ If any of the other answers are checked off, you cannot use the Data Retrieval Tool
- If you answered ‘Already completed’ and then answered ‘None of the above,’ then you should be able to use the Data Retrieval Tool. Click ‘Link to the IRS.’
Step 7: This is just a message telling you that you’re leaving the FAFSA site to go to the IRS site to transfer your tax information. Click ‘OK’ when you’ve finished reviewing the message.

Step 8: Review the information in the pop-up box and click ‘OK.’
Step 9: Provide the information needed to transfer your information. Your name, SSN, and date of birth will be filled in for you.

- Indicate your Filing Status. The status should match what you used on your federal income tax return.
- Fill in your address information. The information needs to match what you used on your federal income tax return. Click ‘Submit’ when you’ve finished.

Step 10: If the transfer was successful, you will see the following screen (though it will say 2014 Federal Income Tax Information). Review it to make sure the information is correct. When you’re ready to transfer your information to your FAFSA, click ‘Transfer My Tax Information into the FAFSA’ and then click ‘Transfer Now.’
Step 11: You now are back on the FAFSA site. **Do not update any answers that say ‘Transferred from the IRS.’** Answer the questions asking how much did you (and your spouse) earn in 2014. Click ‘Next’ when you’ve finished.

Step 12: Enter your 4-digit FAFSA PIN to sign your corrected FAFSA. Click ‘SIGN’ when you’ve finished.

Step 13: Read the information presented on this screen, then click ‘Agree.’ Click ‘Submit My FAFSA Now’ when you’ve finished.
Step 14: Congratulations! You should now be seeing your confirmation page, showing you that your correction has been successfully submitted. You can choose to scroll down to the end of the page and email this page to yourself.