

Pepperdine University, Seaver College
Office of Financial Assistance
IRS Data Retrieval Tool (DRT) Q&A

What is the IRS Data Retrieval (DRT) Tool?

The IRS DRT allows students and parents to access their IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA). Students and parents may transfer the data directly into their FAFSA. The "IRS Data Retrieval" process for the 2016-2017 academic year is available *starting February 1, 2016*.

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student's FAFSA using the IRS DRT.

IRS Data is Available:

- Approximately 2-3 weeks after the return has been accepted by the IRS
- Approximately 6-8 weeks after filing a paper federal tax returns and having it be accepted by the IRS

If you are eligible to use the IRS DRT, we highly recommend using the tool for several reasons:

1. It's the easiest way to provide your tax data.
2. It's the best way of ensuring that your FAFSA has accurate tax information.
3. You won't need to request an [IRS Tax Transcript](#) for you or your parents' tax returns.

If you do not use the IRS DRT to provide tax information or if you are not eligible to use it, you may be required to obtain an official tax transcript from the IRS.

How does the student and parent IRS DRT work?

1. From your FAFSA – Enter your FSA ID (User name and Password) and click **Link To IRS** on the Financial Information page
2. Your FAFSA will be saved and you will be transferred to the IRS Web site.
3. On the IRS Web site, enter the requested information.
4. Once the IRS has validated your identification, your IRS tax information will display. You can either 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 from the IRS Web site, you will have to login to open your saved FAFSA.
5. If you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS."

Who Can't Use the IRS Data Retrieval Tool?

If an independent applicant is married and files separate federal income tax returns or a dependent applicant's parents are married and file separate federal income tax returns (e.g., married filing separately or head of household), the applicant will not be able to use the IRS Data Retrieval Tool. Also, if there has been a change in the marital status of the applicant or parent (if the applicant is a dependent student) after the end of the tax year, the applicant will not be able to use the IRS Data Retrieval Tool.

The IRS Data Retrieval Tool will transfer information only from an original income tax return and not an amended income tax return. Thus if the applicant, spouse or parent, as applicable, has filed an amended income tax return, the applicant will not be able to use the IRS Data Retrieval Tool.

Applicants who have filed a foreign income tax return instead of or in addition to a US income tax return will be unable to use the IRS Data Retrieval Tool. For example, taxpayers who file both a US income tax return and a Puerto Rican tax return will be unable to use the IRS Data Retrieval Tool. Also, the IRS Data Retrieval Tool is available only to taxpayers who have a valid Social Security number. Taxpayers who file income tax returns using a Tax ID Number (TIN) will not be able to use the tool.

The home address listed on the FAFSA must match the home address listed on the federal income tax return.