

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 2015-2016 academic year is available *starting February 1, 2015*.

IRS Data is Available:

- Approximately 2-3 weeks after the return has been electronically filed
- Approximately 8 weeks after filing a paper federal tax returns

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 IRS DRT work?

1. From your FAFSA - Enter your PIN* or FSA ID (User name and Password) and click **Link To IRS**
*You will not be asked to enter your PIN if you entered a PIN to begin your FAFSA.
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."

How does the parent IRS DRT work?

1. From your FAFSA - Enter your PIN and click **Link To IRS**
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."

Why can't I use the IRS DRT if I filed a tax return outside the U.S.?

If you did not file a Federal IRS tax return, you cannot use the IRS Data Retrieval Tool because there is no information on file with the IRS for you to view and transfer.

If you filed both a Federal IRS tax return and a Puerto Rican or foreign tax return, you will only be able to view and transfer your Federal IRS tax return information if you link to the IRS Web site. Therefore, your IRS tax return information may not completely reflect what you need to report on the FAFSA.

Under certain conditions, parents and students are not eligible to use the IRS DRT, which allows users to link to the IRS Web site and securely transfer IRS tax return information into their FAFSA. If you ***meet*** any of the conditions below, you will ***not*** be presented with the option to link to the IRS.

A = Dependent student skipped the income and asset questions – IRS DRT was not displayed

E = First three digits of SSN are 666 – IRS DRT was not displayed

D = Marital status date greater than or equal to January 2015 – IRS DRT was not displayed

C = Tax return status not equal to “Already completed” – IRS DRT was not displayed

H = Student amended his/her tax return – IRS DRT was not displayed

J = Student filed a Puerto Rican or Foreign tax return – IRS DRT was not displayed

K = Student is married and tax return filing status is Married Filing Separate Return – IRS DRT was not displayed

L = Student is married and tax return filing status is Head of Household – IRS DRT was not displayed

M = Conflict between the student's marital status and tax return filing status – IRS DRT was not displayed

B = IRS DRT was displayed to student

The value of the Parent IRS Display Flag is now set in the following priority, from first priority to last priority:

A = Dependent student has special circumstances or Independent student skipped the parent questions – IRS DRT was not displayed

N = Parents' marital status is “Unmarried and both parents living together” – IRS DRT was not displayed

E = First three digits of SSN are 666 – IRS DRT was not displayed

F = Non-married parent or both married parents entered all zeroes in SSN – IRS DRT was not displayed

G = Neither married parent entered a valid SSN – IRS DRT was not displayed

D = Marital status date greater than or equal to January 2015 – IRS DRT was not displayed

C = Tax return status not equal to “Already completed” – IRS DRT was not displayed

H = Parent amended his/her tax return – IRS DRT was not displayed

J = Parent filed a Puerto Rican or Foreign tax return – IRS DRT was not displayed

K = Parents are married and tax return filing status is Married Filing Separate Return – IRS DRT was not displayed

L = Parents are married and tax return filing status is Head of Household – IRS DRT was not displayed