

USING THE DATA RETRIEVAL TOOL (DRT) or OBTAINING A TAX RETURN TRANSCRIPT

You may have received an email from Federal Student Aid recommending that you use the IRS Data Retrieval Tool (DRT) to transfer tax information directly from the IRS into your FAFSA. *Using the DRT is highly recommended* because it is more accurate and, in some cases, the Department of Education may require Millersville to verify the tax information that was provided on the FAFSA. You can even go back and use the Data Retrieval Tool after you have already submitted the FAFSA!

If for any reason the Data Retrieval Tool is unavailable, you can manually enter your tax information into your FAFSA. If Millersville needs to verify the information that you manually entered, you will need to request a *Tax Return Transcript* from the IRS and provide it to Millersville's Office of Financial Aid before financial aid awards can be determined.

How to use the Data Retrieval Tool (DRT)

- Go to fafsa.ed.gov and select the "[Start Here](#)" button
- Log in using your FSA ID
- Select the "[Continue](#)" or "[Make a Correction](#)" button
- Select the "[Financial Information](#)" tab from the top of the page.

Parents

Go to "[Parent Financial Information](#)" page

- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
- If eligible, select which parent is providing information on the FAFSA
- Enter the FSA ID for the parent providing the information
- Click "[Link to IRS](#)"
- Review the information displayed and select the "[Transfer My Information into the FAFSA](#)" option
- If the student also filed taxes, follow the instructions for Students below
- If the student did not file taxes, proceed to the "[Sign and Submit](#)" page

Students

Go to "[Student Financial Information](#)" page

- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
- If eligible, click "[Link to IRS](#)"
- Review the information displayed and select the "[Transfer My Information into the FAFSA](#)" option
- Proceed to the "[Sign and Submit](#)" page

Reasons you will **NOT** be able to use IRS Data Retrieval Tool

- You are married and filed as Married Filing Separately.
- You are married and filed as Head of Household.
- Your parent's marital status is "Unmarried and both legal parents living together."
- You filed a Puerto Rican or foreign tax return – submit a signed copy to the Office of Financial Aid

How to obtain a Tax Return Transcript

If you are selected for verification of your FAFSA, and are unable to use the IRS Data Retrieval Tool, you must submit an official IRS TAX RETURN TRANSCRIPT. *This is not an Account Transcript or a copy of your filed 1040 form.*

There are four different ways you can obtain a Tax Return Transcript:

Request method	Where?	What?	How?	When?	Send to third party?
Online	www.irs.gov/transcript	Paper	Print online or receive by mail	Immediate or 5-10 days	No
IRS2GO Mobile App	www.irs.gov/IRS2GO	Paper	Received by mail	5-10 days	No
Telephone	(800) 908-9946	Paper	Received by mail	5-10 days	No
IRS Form 4506T-EZ	https://www.irs.gov/pub/irs-pdf/f4506tez.pdf	Paper	Received by mail	5-10 days	Yes