



University of Texas at Arlington (UTA)

Office of Financial Aid

2019-2020

IRS Data Retrieval Tool (DRT) and Tax Transcript Instructions

Office: Davis Hall, Room 252 **Phone:** 817-272-3561 **Fax:** 817-272-3555

Mail: PO Box 19199, Arlington, TX 76019 **Email:** faa@uta.edu

PLEASE DO NOT SUBMIT SENSITIVE PERSONAL INFORMATION VIA EMAIL

The 2019-2020 Free Application for Federal Student Aid (FAFSA) requires 2017 tax information. It is highly recommended that the Data Retrieval Tool (DRT) be used, if possible, to provide the required tax information on the FAFSA. The DRT process electronically imports needed tax information directly from the IRS to the FAFSA. It is the fastest and most accurate way to input tax information into the FAFSA form. If the DRT option is used successfully, submission of a tax transcript will not be needed to verify income if your FAFSA is chosen for verification.

HOW TO USE THE DATA RETRIEVAL TOOL (DRT):

1. Log into fafsa.gov. Click “Start a New FAFSA”, or click “Make Corrections” if you have already submitted a FAFSA and need to correct the previously reported data.
2. Under the “Financial Information” tab, choose the IRS Data Retrieval Tool option or “Link to IRS.” This will take you to an information page with the IRS.
3. Authorize the transfer of information from the IRS and click “Transfer Now” to transfer the tax information. You will then be directed back to the FAFSA page.
4. Security and privacy protections are in place to better protect your privacy.
 - The tax return information will not be displayed to you on the IRS web application, on your FAFSA form, or on your Student Aid Report (SAR). Instead, you will see “Transferred from the IRS” in the appropriate fields.
 - The detail of the data will be available to the financial aid office via the downloaded Institutional Student Information Record (ISIR) for eligibility determination and processing purposes.
5. Joint return filers will need to manually enter the appropriate income earned from work for each filer on the FAFSA. Filers with rollovers will be required to answer screening questions to determine how the rollover amount should be populated on the application.
6. Once all required FAFSA information is completed, proceed to the “Sign and Submit” section of the FAFSA to submit the information to the federal processor.

IF THE DATA RETRIEVAL TOOL (DRT) IS NOT USED:

If your FAFSA is chosen for verification and the DRT process was not used, you will be required to secure a copy of the 2017 tax transcript(s) directly from the IRS for submission to the financial aid office. Please include your UTA ID number on the transcript for identification purposes before submitting to the UTA Office of Financial Aid.

To request a free copy of the IRS Tax Transcript:

- go to <https://www.irs.gov/individuals/get-transcript>;
- call 1-800-908-9946; or
- visit a local IRS office.