



# WEST LIBERTY UNIVERSITY

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## 2021-2022 IRS Data Retrieval Tool Instructions

Students and parents may be eligible to use the IRS Data Retrieval Tool (IRS DRT) to import their 2019 U.S. Federal Income Tax Return directly to the 2021-2022 Free Application for Federal Student Aid (FAFSA). This tool is accessed within the FAFSA application online. It can be located on both the student and parent financial tabs, depending on whose information you are going to import.

Using the IRS DRT is the fastest, safest, and easiest way to verify your FAFSA data with accurate tax information. In the few simple steps listed below, you can transfer the required tax information directly into your FAFSA.

1. Log into **studentaid.gov/h/apply-for-aid/fafsa** by using an FSA ID and password.
2. If the FAFSA has previously been submitted, click **Make FAFSA Corrections**.
3. In the **Financial Information** section, select **Already Completed** if the 2019 IRS income tax return has already been completed. You will then enter the type of tax return filed and the tax filing status as listed on the 2019 tax return.
4. Click **Link to IRS** and enter the FSA ID and password. You will then click **Proceed to the IRS Site**.
5. Enter all requested information EXACTLY as it appears on your **2019** Income Tax Return and then click **Submit**.
6. Check the box for **Transfer My Tax Information into the FAFSA Form** and then click **Transfer Now**.
7. You will then be redirected back to the FAFSA, where you will see the words "Transferred from the IRS" displayed as confirmation in the data fields where the information was transferred. For your protection, you will not see the actual data on the IRS site or the FAFSA site.
8. These steps can be used for both the student and the parent if applicable.
9. Provide electronic signatures when prompted at the end of the FAFSA form. Once the student/parent(s) agree to the terms and click **Submit My FAFSA Now** a confirmation page will appear and the results will be sent to the schools listed in the school section.

Data transferred from the IRS will not be displayed to the applicant or parent. Consequently, applicants will not be able to make corrections to any of the transferred data after using the IRS DRT. If you need to make adjustments, please contact our office.

If you are unable to use the IRS DRT, you can instead submit a copy of your 2019 Tax Return Transcript to our Financial Aid Office. Instructions on obtaining that form directly from the IRS are included on our website at **westliberty.edu/financial-aid/instructions-and-guides/**.