

Slide 1 - Introduction	Thank you for joining this session on the topic of the IRS data retrieval tool. It is brought to you by the Office of Student Financial Assistance, a division of the Florida Department of Education – a state sponsor of the National Training for Counselors and Mentors (NT4CM).
Slide 2 – IRS Data Retrieval Tool	The IRS data retrieval tool is located within the Free Application for Federal Student Aid (FAFSA). It should be used by all students and parents who fit the eligible tax filing statuses. If a student or parent cannot utilize the IRS Data Retrieval Tool, the tax information may be entered manually.
Slide 3 – IRS Data Retrieval Tool	Students completing a 2017–2018 FAFSA will be able to utilize IRS data retrieval tool beginning October 1, 2016, the same day the FAFSA opens. There is an anticipated much higher utilization rate for the IRS data retrieval tool due to the use of 2015 tax information.
Slide 4 – IRS Data Retrieval Tool	The FAFSA has built-in logic and questions that will help the student and parent determine if they are eligible to use the IRS data retrieval tool. If the FAFSA determines the applicant is eligible, it will direct him or her to the IRS website and allow the information to be directly imported from the IRS to the FAFSA. It is important to note that when using the IRS Data Retrieval Tool, the IRS website will require the exact address and filing status from the applicable tax return. If the FAFSA determines the applicant is ineligible, they will be directed to input the information manually. Applicants who are required to input the information manually are highly encouraged to contact the IRS and request a tax return transcript. The college or university may request this document to confirm the manually entered information during the verification process.
Slide 5 – Common Questions	Some of the more common questions regarding using the tool are as follows: Can unmarried parents living together use the IRS data retrieval tool? The answer is no, they are not eligible to use the IRS data retrieval tool. Nor are married parents who file taxes separately. Second question: Can same gender married couples use the IRS data retrieval tool? The answer is yes, if they filed their taxes as married filing jointly. However, if they filed their taxes as married filing separately, they cannot. For additional information regarding the IRS data retrieval tool, please visit: https://studentaid.ed.gov/sa/resources/irs-drt-text .
Slide 6– Final	If you need additional assistance with this topic? Please feel free to visit Navigating YourFuture.org and select the Contact Us tab to locate your regional outreach representative. We will be more than happy to help! Thanks for attending today’s session.