

## **IRS Data Retrieval Process - Parent 2023-2024**

### **OFFICE OF FINANCIAL AID WINTHROP UNIVERSITY**

The IRS Data Retrieval Tool (DRT) is the easiest way to provide your parent's **2021** tax data on your Free Application for Federal Student Aid (FAFSA). It allows parents to transfer information from their **2021** Federal Tax Return directly to the FAFSA.

If your parent(s) are not eligible, or choose to not use the DRT, your parent(s) may be required to submit a copy of a Federal IRS Tax Return Transcript to the Office of Financial Aid. Please refer to the IRS Tax Return Transcript Process (<http://www.winthrop.edu/finaid/howto>)

#### **Using the DRT for parents' tax information by correcting your 2023-2024 FAFSA**

- Have your parent log in to your FAFSA at [studentaid.gov/h/apply-for-aid/fafsa](http://studentaid.gov/h/apply-for-aid/fafsa)
- If making corrections to a previously submitted FAFSA, click **Make FAFSA Corrections** link
- Click on **Parent Financials tab** of the FAFSA
- Choose **Already Completed** from the drop down menu under the question "For **2021**, has your mother/father/parent completed his/her IRS income tax return...?"
- Answer any additional questions asked.
- Your parent may need to enter his/her FSA ID and click on **Proceed to the IRS** button or **Link to IRS** button (it may ask you to do this twice)
- Your FAFSA will be saved and your parent(s) will be transferred to the IRS Web site (you may get a pop up box where you have to click **Ok** to acknowledge you are leaving FAFSA website for the IRS website)
- Once on the IRS Web site, enter the requested information and click submit (note - the address you enter must match your parent(s) 2021 tax return EXACTLY). Press **Submit**.
- Check the box to **Transfer My Tax Information into the FAFSA Form** and click the **Transfer Now** button.
- Your parent will be returned to the FAFSA. You will know it was successful when they see the words **Transferred from IRS** in place of tax information on FAFSA.
- Continue through the FAFSA and answer the remaining questions. Don't forget to enter wages on the "how much did parent/father/mother earn from working..." question(s). Click **Sign & Submit** tab and choose **Next**.
- Enter all required fields and press **SUBMIT MY FAFSA NOW**. Your DRT is not complete until you complete this step.

For assistance in using the DRT, please contact the Federal Student Aid Information Center at 1-800-433-3243 or click the "live help" online at [www.fafsa.ed.gov](http://www.fafsa.ed.gov).