

IRS Data Retrieval Process - Student 2023-2024

OFFICE OF FINANCIAL AID WINTHROP UNIVERSITY

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

If you are not eligible, or choose to not use the DRT, you 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 by correcting your 2023-2024 FAFSA

- Log in to your FAFSA at studentaid.gov/h/apply-for-aid/fafsa
- If making corrections to previously submitted FAFSA, click **Make FAFSA Corrections** link
- Click on **Student Financials** tab of the FAFSA and choose **Already Completed** from the drop down menu under the question “For 2021, have you completed your IRS income tax return...?”
- Answer any additional questions asked.
- Click **Proceed to the IRS** button
- Click **Proceed to the IRS** button (Press OK if a popup box occurs telling you that you are leaving FAFSA website)
- Your FAFSA will be saved and you will be transferred to the IRS Web site.
- On the IRS Web site, enter the requested information and click submit (note - the address you enter must match your 2021 tax return EXACTLY). Press **Submit**.
- Check the box to **Transfer My Tax Information into the FAFSA Form** and click the **Transfer Now** button
- You will be returned to the FAFSA. You will know it was successful when you see the words **Transferred from IRS** in place of tax information on the FAFSA.
- Continue through the FAFSA and answer the remaining questions. Don't forget to enter your wages on the “how much did you earn from working...” question
 - If applicable, also enter “how much did your spouse earn from working...” question
- 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.