

IRS Data Retrieval Process - Student 2019-2020

OFFICE OF FINANCIAL AID WINTHROP UNIVERSITY

The *IRS Data Retrieval Tool* (DRT) is the easiest way to provide your **2017** tax data on your Free Application for Federal Student Aid (FAFSA). It allows students to transfer information from their **2017** 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 2019-2020 FAFSA

- These instructions also work if you are submitting your FAFSA for the first time this aid year
- Log in to your FAFSA at www.fafsa.gov
- If making corrections to previously submitted FAFSA, click **Make FAFSA Corrections** link
- Click on **Financial Information** tab of the FAFSA and choose **Already Completed** from the drop down menu under the question “For 2017, have you completed your IRS income tax return...?”
- Answer any additional questions asked.
- Click on **Link TO IRS** button
- 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 2017 tax return EXACTLY). Press **Submit**.
- Check the box to “Transfer My Tax Information into the FAFSA” and click the **Transfer Now** button
- You will be returned to 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.