

## IRS DATA RETRIEVAL TOOL (DRT) STEP-BY-STEP INSTRUCTIONS

Step 1: Collect your 2021 Federal Tax Return and 2021 W-2 wage statements for reference prior to using the DRT

Step 2: Go to [studentaid.gov](https://studentaid.gov) and hover over the 'FAFSA Form' drop down option and click 'Complete the FAFSA form'.

Step 3: Select either parent or student to access the FAFSA form and log in with your FSA ID

Step 4: Select the '2023-24' academic year tab and enter your 'Save Key'

Step 5: Select parent or student 'Financial Information' tab

Step 6: Select if you completed a 2021 Federal Tax Return in the drop down menu

Step 7: If you filed a 2021 Federal Tax Return, select the tax filing status in the drop down menu (Single, Married, Head of Household, etc.)

Step 8: Click 'Link to the IRS' and click 'Proceed to Site' when offered the option

Step 9: Click 'OK' to leave the FAFSA page to continue to the IRS and click 'OK' to the Government System message

Step 10: Enter your name, date of birth, filing status and address exactly as it appears on your 2021 Federal Tax Return – then click 'Submit'

Step 11: Check the first small box at the bottom of the page indicating you would like to 'Transfer My Tax Information in the FAFSA form' and click the box 'Transfer Now'

Step 12: Click the 'Next' box after being brought back to the FAFSA form and showing your Tax information was transferred from the IRS

Step 13: Use your 2021 W-2 wage statement(s) to populate earnings in 2021

Step 14: You will be asked to review the information on your FAFSA and then click 'Next' until you are asked to submit your FAFSA

Step 15: Be sure to click 'Submit' to complete your FAFSA application with added income information

Step 16: Be sure to see the confirmation page indicating you have successfully submitted your FAFSA

Step 17: Log out