



The IRS Data Retrieval Tool (IRS DRT)

The IRS Data Retrieval Tool allows applicants who have already filed their 2021 federal tax returns to prefill the answers to some questions on the FAFSA. The tool transfers data from an applicant's federal tax return to the FAFSA. The tool is the fastest and most accurate way of entering your 2021 tax information on your 23-24 FAFSA. Both students and parents can use this tool. Please note that for security, transferred tax data **WILL NOT** appear on the 23-24 FAFSA. It will simply say, "Transferred from the IRS." Your FAFSA Student Aid Report (SAR) will also not contain transferred IRS Tax Information.

Who Can Use the Tool?

Applicants must have a valid Social Security Number and FSA ID to use the IRS Data Retrieval Tool. The applicant will need to authenticate himself or herself to the IRS in order to use the tool. Students and parents must use the tool separately for their respective income tax returns.

Who Can't Use the Tool?

Students or parents whose marital status does not match their tax filing status. Changes in marital status of the student or parent after the end of the tax year will make the applicant unable to use the tool. Those who filed an amended tax return cannot use the tool as well. Those who have filed an extension, are a victim of identity theft, or owe back taxes to the IRS will not be able to use the tool until these issues are resolved. Lastly, the home address listed on the FAFSA must match the home address listed on the federal tax return in order to use the tool.

To Access the IRS Data Retrieval Tool

- Go to <https://studentaid.gov/h/apply-for-aid/afsa> and select the "Start Here" button
- Log in using your FSA ID. If you do not have an FSA ID you will need to create one via studentaid.gov
- Select "Start FAFSA" if you are beginning a FAFSA for the first time
- Select the "Login" if you are a returning user
 - Select "Make FAFSA Correction" if you are updating an existing FAFSA
- Select the "Financial Information" tab from the top of the page

Instructions to Utilize the IRS Data Retrieval Tool

- Go to "Student Financial Information" (or "Parent Financial Information" if applicable)
- Indicate if the student/parent has completed their 2021 tax return and their 2021 tax filing status
- Answer the questions in the next box to see if you are eligible to use the IRS Data Retrieval Tool
- If eligible, enter your FSA ID (if you did not log into the FAFSA using it initially)
- Click "Link to IRS" – You will then be transferred to the IRS website
- Enter the personal and address information **EXACTLY** as it appears on your tax return and select "submit"
- Select the "Transfer My Information into the FAFSA" option and click "Transfer Now"
 - Please note you will NOT see your tax information when the info is transferred! Instead, you will see **"Transferred from the IRS"** in the appropriate fields on the FAFSA.
- Enter your (and your spouse's, if applicable) wages earned for 2021 and answer if you are a dislocated worker



Office of Financial Aid

5000 Abbey Way SE OM250 Lacey, WA 98503

C: 360.688.2150 | T: 360.995.1008 | E: finaid@stmartin.edu

<https://www.stmartin.edu/admissions-financial-aid>

Scan the QR Code to turn in the completed form via Secure Dropbox





Saint Martin's UNIVERSITY

Office of Student Financial Services

- Review the Untaxed Income questions, and answer the last three questions regarding net worth and cash assets
- Sign and Submit your FAFSA

If you need assistance using the tool, please contact the SMU Student Financial Services office at 360-438-4397 or email finaid@stmartin.edu

You can also utilize the Federal Student Aid Help Center (<https://studentaid.gov/help-center/contact>)

A Note on FAFSA Corrections:

Please make sure you review and submit ALL FAFSA corrections at once. Once a FAFSA correction is submitted, you will normally have to wait 3 to 5 business days to submit **additional** corrections. This can cause delays in your Financial Aid.

Student Financial Services does weekly imports of new and updated FAFSA applications. It will normally take 5 to 7 business days for us to import your corrected FAFSA once you sign and submit.



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