

## 2023-2024 Step-By-Step DRT Instructions

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Please refer to the step-by-step instructions below to utilize the Data Retrieval Tool (DRT), when completing your 2023-2024 FAFSA application on the web. If you are a dependent student and need to transfer your parent(s)' 2021 tax information as well, the instructions will work similarly when transferring the parent(s)' information.

You will be able to utilize the Student Demographics School Selection Parent Demographics Financial Information Confirmation DRT tool when you reach the "Financial Information" tab in Student Tax Information your 2023-2024 FAFSA Help and Hints application. Please make sure the Did you file a Puerto Rican or foreign tax return? following 3 questions are Attention! You must provide financial information from your 2016 tax S return on the following pages. answered to use the DRT tool. foreign tax return, select Yes; T otherwise, select No. U \*\*Please note your 2021 tax You are not eligible to use the Application was successfully saved IRS Data Retrieval Tool if you filed a Puerto Rican or foreign D return will need to be already tax return. completed and processed by the Ε For 2016, have you completed your IRS income tax return or another tax return? Related Topics: IRS to use the DRT tool: N Already completed V Why can't I use the IRS Data T Retrieval Tool if I filed a tax return outside the U.S.? For 2016, what is your tax filing status according to your tax return? Did you file a Puerto Rican or foreign tax return for 2016? ○ Yes 

No If you are eligible to use the DRT tool, the Link to IRS Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)! option will appear: LINK TO IRS **Click Link to IRS** PREVIOUS NEXT NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT Sign & Submit Confirmation Student School Dependency Parent **Financial** Demographics Demographics **Help and Hints** What is your (the student's) FSA ID Username or Verified E-mail Address? You are now leaving FAFSA on the Web and will be transferred to the IRS Web site to S access your IRS tax information. Your FAFSA information will be saved. You must enter your FSA ID T Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to FAFSA on the Web from the IRS Web site. If you do not username. If you have verified the e-mail address on file with your FSA ID, you may use it U transfer your information or choose not to return to FAFSA on the Web from the IRS Web site, you will have to log in to open your saved FAFSA. instead of your username to access the IRS Web site and On the next screen, please enter D For your protection, your tax return information will not display on the IRS Web site your FSA ID login information: request your income tax Ε What is your (the student's) FSA ID? N If you do not already have an FSA ID, you can create an FSA FSA ID Username or Verified E-mail Forgot Username If you have an FSA ID but do FSA ID Password not remember your username or verified e-mail address, click Forgot Username Click Proceed to IR\$ Site to continue. Otherwise, click Skip IR\$ Transfer. Note: Your FSA ID e-mail address may be different from your FAFSA e-mail address. Then, click Proceed to IRS Site If you have any questions or problems using this tool, view available Help options for SKIP IRS TRANSFER PROCEED TO IRS SITE

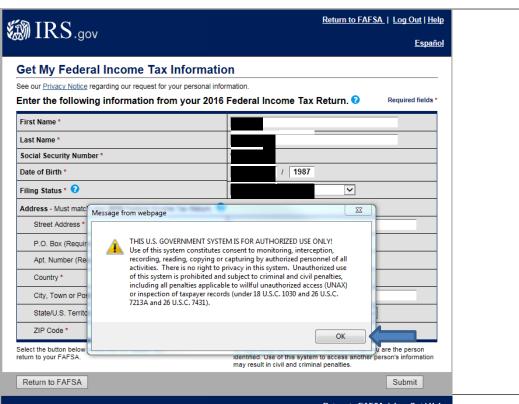
When you arrive at IRS.gov, a consent to monitoring message from the Internal Revenue Service will appear.

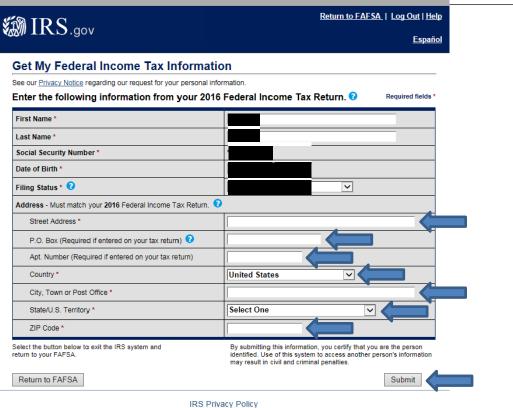
To continue with the data transfer, **click OK** 

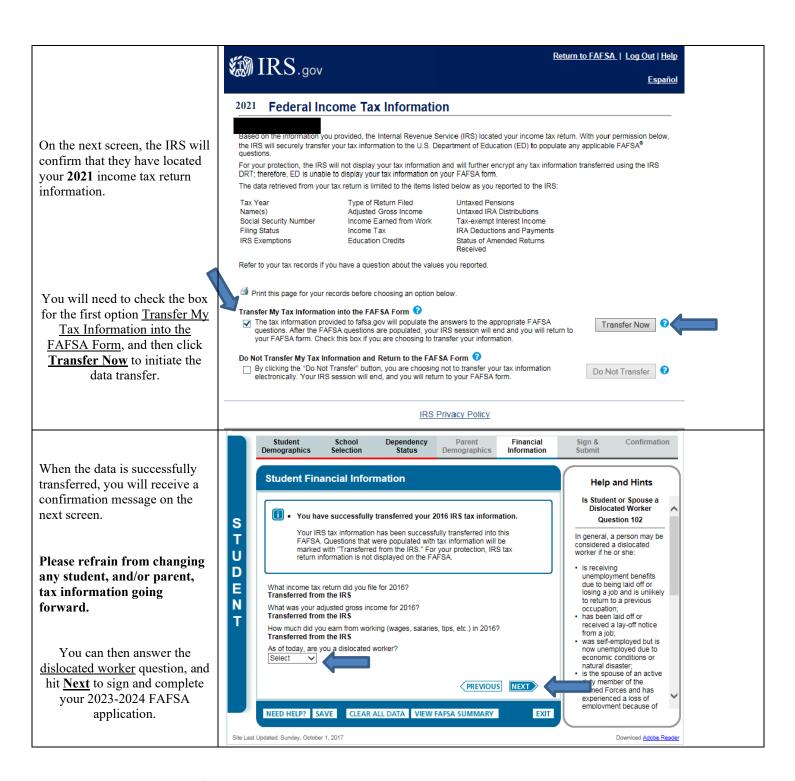
Your First/Last name, last 4 of SSN #, DOB, and **2021** filing status information will be visible on your screen.

You will need to enter the street address **exactly** the way it was reported on the filer(s) **2021** tax return, in order to be located by the IRS.

When you are finished entering the address information, click Submit:







<sup>\*\*</sup>Please note that if you are not able to use the DRT tool, you will need to manually enter you and/or your parent(s)' 2021 tax information, using a 2021 tax return copy.