

**Pepperdine University, Seaver College**  
**Office of Financial Assistance**  
**IRS Data Retrieval Tool (DRT) Q&A**

**What is the IRS Data Retrieval (DRT) Tool?**

The IRS DRT allows students and parents to access their IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA). Students and parents may transfer the data directly into their FAFSA. The IRS Data Retrieval process for the 2014-2015 academic year is available *starting mid-February 2014*.

**IRS Data is Available:**

- Approximately 2 weeks after the return has been electronically filed.
- Approximately 8 weeks after filing a paper federal tax return.

**If you are eligible to use the IRS DRT, we highly recommend using the tool for several reasons:**

1. It's the easiest way to provide your tax data.
2. It's the best way of ensuring that your FAFSA has accurate tax information.
3. You won't need to request an [IRS Return Transcript](#) for your or your parents' tax returns. \*

\* If you do not use the IRS DRT to provide tax information or if you are not eligible to use it, you may be required to obtain an official Return Transcript from the IRS (this is not a copy of your taxes – it is a document which must be obtained directly from the IRS after your returns have been completely processed).

**How does the student IRS DRT work?**

1. From your FAFSA - Enter your PIN\* and click **Link To IRS**.  
\*You will not be asked to enter your PIN if you entered a PIN to begin your FAFSA.
2. Your FAFSA will be saved and you will be transferred to the IRS Web site.
3. On the IRS Web site, enter the requested information.
4. Once the IRS has validated your identification, your IRS tax information will display. You can either transfer your information from the IRS, or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return from the IRS Web site, you will have to login to open your saved FAFSA.
5. If you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS."

**How does the parent IRS DRT work?**

1. From your FAFSA - Enter your PIN and click **Link To IRS**.
2. Your FAFSA will be saved and you will be transferred to the IRS Web site.
3. On the IRS Web site, enter the requested information.
4. Once the IRS has validated your identification, your IRS tax information will display. You can either transfer your information from the IRS, or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return from the IRS Web site, you will have to login to open your saved FAFSA.
5. If you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS."