

IRS Data Retrieval Process

IRS Data Retrieval is how a student and/or parent can have their income information pulled directly from their federal income tax return into the FAFSA. The financial aid office can use this in place of a tax return transcript as part of the verification process. This data retrieval can occur either when the student is initially submitting the FAFSA, or after the FAFSA has already been submitted by logging back into www.fafsa.gov and making a correction to the FAFSA.

In order for the IRS Data Retrieval process to work:

- At least two weeks must have passed since the tax return was submitted to the IRS
- The address of the tax payer must be entered exactly as it appears on the tax return when trying to retrieve tax data
- The tax payer must not 1) be married and filing separate tax returns, 2) have had a change of marital status after December 31, or 3) have filed an amended tax return. In all of these situations, the tax filer must submit a Tax Return Transcript when selected for verification.

To use the IRS Data Retrieval process:

1. Wait at least two weeks (for tax returns submitted electronically) or eight weeks (for tax returns submitted via paper) after the tax returns have been submitted.
2. Go to www.fafsa.gov to either complete the FAFSA or correct a FAFSA that has already been submitted.
3. In the *Financial Information* section for the student, make sure you answer that the tax return has "already been completed."
4. You will be presented with a set of questions to determine if you qualify to use the IRS Data Retrieval Process.
5. If you can answer No to all of the questions you will be directed to the Retrieval Tool. Click *Link to IRS*.
6. Your FAFSA will be saved and you will be transferred to the IRS Web site.
7. On the IRS Web site, enter the requested information. Make sure you enter your address exactly as it appears on your tax return. Click *Submit*.
8. Once the IRS has validated your identification, your IRS tax information will display.
9. You must then click in the box below your tax data that reads, "Transfer my tax information into the FAFSA" and also click on the rectangle that reads, "Transfer Now." You will then be returned to your FAFSA.
10. Questions that are populated with tax information will be marked with "Transferred from the IRS." Do not make changes to information marked "Transferred from the IRS."
11. Update the "wages earned" if not accurate, as this information is not transferred from the IRS.
12. Once you have completed steps 3 – 11 for the student, repeat these steps for the parent(s) if parent information is required on the FAFSA.
13. Proceed to the end of the submission page and submit your FAFSA with the corrections. You will receive a confirmation number and page that will be emailed to you.