

IRS Data Retrieval Tool (FAQs)

The implementation of an earlier Free Application for Federal Student Aid (FAFSA) application opening Oct. 1, and using tax information that is two years old, brings with it many benefits for students and parents. Because most families have filed their taxes by the time the FAFSA application opens, more families can use the valuable IRS Data Retrieval Tool. The IRS Data Retrieval Tool lets students and parents transfer their IRS tax return information from the IRS website directly into their FAFSA.

Although it is not required, if you are eligible to use the IRS Data Retrieval Tool, we strongly urge you to use the tool for several reasons:

- ☐ It's the easiest way to provide your tax return information.
- ☐ It's the best way to make sure your FAFSA has accurate tax return information.
- ☐ It may mean you don't have to send more documents to your college.

AM I ELIGIBLE TO USE THE IRS DATA RETRIEVAL TOOL?

Most students and parents are eligible to use the IRS Data Retrieval Tool if they have already filed their taxes. However, students and parents are ineligible to use the IRS Data Retrieval Tool in the following cases:

- ☐ The student/parent is married, and either the student/parent or his/her spouse filed as Married Filing Separately.
- ☐ The student/parent is married, and either the student/parent or his/her spouse filed as Head of Household.
- ☐ The parents' marital status is "Unmarried and both parents living together."
- ☐ The student/parent filed a Form 1040X amended tax return. Remember, the Form 1040X is used to correct your original tax return.
- ☐ The student/parent filed a Puerto Rican or foreign tax return.

Any students or parents who meet these criteria will need to enter their tax return information manually.

HOW DOES THE IRS DATA RETRIEVAL TOOL WORK?

To use the IRS Data Retrieval Tool within the application on the student or parent finances pages:

1. If you indicated that you filed your taxes or have already used the IRS Data Retrieval Tool to transfer your tax return information into your application, click the "View option to link to the IRS" hyperlink. (Note: If you are eligible to use the IRS Data Retrieval Tool and have not previously used it to transfer your tax return information into your application, then the "View option to link to the IRS" hyperlink does not display; skip ahead to step 2.)
2. Enter your FSA ID and click Link To IRS. (Note: Students will not be asked to enter their FSA ID if they entered an FSA ID to begin their FAFSA.)
3. Your FAFSA will be saved, and you will be transferred to the IRS website.
4. On the IRS website, enter the requested information exactly as it appears on your tax return.
5. After 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*.

If you transfer your IRS tax information, questions that are populated with that tax information will be marked with "Transferred from the IRS."

Note: The person whose tax information is being transferred should enter his or her FSA ID.

Source: Department of Education