IRS Data Retrieval Overview

The IRS Data Retrieval Tool allows certain applicants to transfer information directly from the IRS' database into the FAFSA which reduces time, effort, and data entry for FAFSA applicants and/or their parents (if applicable). However, those with tax filing status of Married Filing Separately, Married Filing Head of Household, Parent Marital Status "unmarried and both parents living together," Puerto Rican or foreign tax return, who filed an amended tax return or had a change in marital status since January 1 (current year) are not eligible to use the IRS Data Retrieval Tool. In order to use the IRS Data Retrieval tool, a person must have a valid social security number, must have filed a federal income tax return and must not have changed marital status since January 1.

Why is the IRS Data Retrieval Tool necessary?

It is the Department of Education's expectation that schools will rely on information provided by the IRS as the primary source of documentation for verification purposes. Federal regulations state that copies of income tax returns are no longer acceptable.

How do I access the IRS Data Retrieval Tool?

Student's and/or parent's **must actively choose** to utilize the data retrieval tool. If they choose to do so, they will be transferred to the Internal Revenue Service web site.

FOTW applicants who indicate that they have already completed an IRS income tax return are presented with the opportunity to view their own tax information on file with the IRS and select to transfer the data. A series of questions determine if applicants are eligible to use the IRS Data Retrieval Tool. If eligible, the option to enter a FSA ID is presented and links user to the IRS web site in a new browser window.

The following tutorial will introduce the IRS Data Retrieval Tool:
http://www.finaid.ucsb.edu/media/videos/1516/english/irs-data-retrieval.htm

Brief instructions are provided for reference as well:

1. Log into the FAFSA – www.fafsa.gov
2. Enter your Student Information and FSA ID
3. Click on the link "Make Corrections" (if you previously completed the FAFSA)
4. Click on the "Financial Information" tab at the top
5. On the "Financial Information" page, click on the link "view option to link to the IRS" or "link to IRS"
6. **Link To IRS**
7. Your FAFSA will be saved and you will be transferred to the IRS Web site.
8. On the IRS Web site, enter the requested information (make sure the information is entered **EXACTLY** as it appears on the federal tax return).
9. Applicants will need to authenticate their identity before any personal information is displayed.
10. Once the IRS has validated your identification, your IRS tax information will display. Follow the instructions to "submit" and "**transfer**" your information from the IRS.
11. If you transfer your IRS tax information, questions that are populated with tax information will be marked with "**Transferred from the IRS**."
12. **IMPORTANT**: Return to the FAFSA to Sign & Submit the corrections, using your FSA ID.
13. Once the corrections have been submitted, you should receive a message stating "**Processed Successfully**"

Reminders with regard to the IRS Data Retrieval tool

IRS Data Retrieval can be used for initial application as well as corrections (and is typically available in February).

The information used for the login on the IRS site has to match what is on the tax form **exactly**, i.e. Address and Marital Status.

Generally, tax information is available on the IRS Data Retrieval Tool within 10 days after filing taxes electronically, 6-8 weeks if filing taxes using the U.S. Postal Service.

Data transferred from the IRS will populate the appropriate FAFSA fields. Each field will be labeled "Transferred from the IRS."

If your federal tax return indicated a balance owed, this may result in a delay in processing.   Rev 05/18/15