

Using the FAFSA IRS Data Retrieval Tool

What is the IRS Data Retrieval Tool? The IRS Data Retrieval tool is a technology innovation to streamline the FAFSA application process. After February 1, parents and students may use this feature to upload the necessary federal tax data from their previous year's federal tax return straight from the IRS onto their FAFSA.

How do I access the IRS Data Retrieval Tool? When completing the online FAFSA, www.fafsa.gov, you can access the IRS Data Retrieval Tool in the "Financial Information" section of the application. It will only be available if you indicate that you have already completed your federal tax return for the most recent year.

Who can use the IRS Data Retrieval Tool? After electronically filing your federal taxes, the data should be available to access through the IRS Data Retrieval tool within 2 weeks. It may take much longer – 6 to 8 weeks – if your tax return is mailed. Also, there are certain tax filing statuses that make some students or parents exempt from using the tool. As shown below, filers will be asked a series of questions to determine if they are eligible to use the IRS Data Retrieval Tool.

The screenshot shows the "Parent Tax Information" section of the FAFSA application. A vertical blue bar on the left contains the word "PARENT" in white capital letters. The main content area has a blue header with the text "Parent Tax Information". Below the header, there is a green checkmark icon and the text "Application was successfully saved." Below that, a question asks "For 2011, have your parents completed their IRS income tax return or another tax return?" with a dropdown menu set to "Already completed". A green icon with a question mark follows, with the text "You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS." Below this, it says "Check all that apply or check None of the above." There are seven checkboxes with corresponding text: "You, the parents, filed as Married Filing Separately", "You, the parents, filed as Head of Household", "You, the parents, filed an amended tax return", "You, the parents, filed a Puerto Rican or foreign tax return", "You, the parents, recently filed taxes", and "None of the above". At the bottom of the form, there are "PREVIOUS" and "NEXT" buttons. Below the form, there is a blue bar with buttons for "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT".

What is the process to upload my federal tax data? If you are eligible to use the IRS Data Retrieval Tool, you will be required to provide your Federal Student Aid (FSA) PIN. If you don't have your FSA PIN, you may apply for it at this point. You are then transferred to the IRS website where identification is validated, including your exact address on record with the IRS. If a successful match is made, your federal tax data will be displayed and you can then transfer the data directly to your FAFSA.

What if I need to complete the FAFSA before my taxes are completed? Always make sure to meet college financial aid deadlines. If deadlines come up before you are able to complete your taxes, estimate your federal tax information for the FAFSA. Later, after your taxes are complete, you will be required to update your FAFSA with actual tax data. The best way to do this is with the IRS Data Retrieval tool.

How do I use the IRS Data Retrieval Tool to update my federal tax data on the FAFSA? Log into your FAFSA by visiting www.fafsa.gov and entering the student's identifying information. Then click "Make FAFSA Corrections" and enter the student's Federal Student Aid PIN and password. Review each section of the application, verifying that all initially reported information is still correct, and make corrections if necessary. If you initially estimated your federal tax data, in the "Financial Information" section, change your tax filing status from "will file" to "already completed." The IRS Data Retrieval Tool will then be available to utilize.