



## Using the IRS Data Retrieval Tool

The IRS Data Retrieval Tool allows students and parents to access the IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA), and transfer the data directly into their FAFSA from the IRS Web Site.

If you are eligible to use the IRS Data Retrieval Tool, 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 provide a copy of your or your parents' tax return transcripts to your college.

If you already filed your initial FAFSA for the school year or you need to correct your FAFSA because you have since filed your federal return, you may be eligible to use the IRS Data Retrieval Tool by following these step-by-step instructions.

- Log into your FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov) and click "Login"
- Ensure the award year tab you are on is the correct year for which you are going to use the IRS Data Retrieval Tool (2018-2019, 2019-2020, 2020-2021 etc.)
- Click on "Make FAFSA Corrections"
- At the top of the page, click on the "Financial Information" tab
- Update your tax filing status (question 32) to **Already Completed**
- In the IRS Data Retrieval Tool box, answer the 3 questions, when prompted
- If eligible, the "Link to IRS" blue button will appear
- Click the button and you will be directed to the IRS website after two "ok's"
- Enter your tax filing status and address EXACTLY as it appears on your Federal tax return
- Click "Submit"
- Check the box to "Transfer my tax information into the FAFSA"
- Click "Transfer Now"
- View your successful transfer page
- At the top of the page, click "Sign & Submit" tab
- View the corrections you made and click "Next"
- Click "Submit my FAFSA Now"
- Print your confirmation page
- Logout of your FAFSA

If the IRS Data Retrieval will not work, you may need to obtain a Tax Return Transcript by following the instructions listed on the Verification Worksheet.

**Those who are ineligible to use the IRS Data Retrieval Tool include students or parents who:**

- Filed as Married Filing Separately
- Are married and filed as Head of Household
- Filed an amended tax return
- Filed a Puerto Rican or foreign tax return

Additionally, students or parents who filed their tax returns electronically within the last three weeks, or through the mail in the last eleven weeks, might need to either enter their tax information manually and return at a later date to transfer their tax return information into their FAFSA, as their tax return information might not be available for transfer from the IRS.