



# IRS Data Retrieval Tool Reference Guide

# IRS Data Retrieval Tool Recap

## A Simplified Way of Completing the FAFSA Introduced in 2011/12

- Simplifies FAFSA completion by allowing an applicant who has filed their tax return with the IRS to electronically transfer data from the tax return to the FAFSA
- If a tax filer files electronically, the tax return data will be available for retrieval and transfer after two weeks. If a filer submits a paper tax return, the tax return data will be available for retrieval and transfer after eight weeks.
- Information retrieved using the IRS Data Retrieval Process that is not subsequently changed, is considered acceptable documentation of the income information if the applicant's record is selected for **federal** verification

# IRS Data Retrieval Tool Recap

- If a family completes the FAFSA but has not yet completed their tax returns, FOTW will remind them that they can make FAFSA corrections by using the IRS Data Retrieval Tool to transfer IRS data into the FAFSA once tax returns are filed. The U.S. Department of Education will continually remind these families with emails and other correspondence that they should update their FAFSA information once their tax returns have been filed.
- The IRS Data Retrieval Tool does not transfer income earned from work and this can affect a student's EFC. It is very important that students and parents answer these questions on the FAFSA.

# IRS Data Retrieval Tool

## Who is eligible to use the IRS Data Retrieval Tool (DRT)?

Most students and parents can use the DRT. However, students and parents who are **married** but filed separate tax returns cannot use the IRS Data Retrieval Tool. **Other** tax filing statuses ineligible for the IRS Data Retrieval Tool include:

- **Married filing separately;**
- **Filing as Head of Household;**
- **Filing an amended return; and**
- **Puerto Rican or foreign returns**

Students and parents unable to use the IRS Data Retrieval Tool may be required to submit a copy of their IRS Tax Return Transcript. **Families should not submit copies of tax returns!** If an amended return is filed, families must submit signed copies of both the original tax return and the IRS Form 1040X that were filed with the IRS.

# IRS Data Retrieval Tool

When going to use the IRS Data Retrieval Tool, answer "Already Completed"- Black Arrow.

This will display the boxes indicated by the red arrow. Check all that apply or non of the above.

Checking a box will display the section indicated by the Green Arrow, where the PIN should be entered.

For 2012, have your parents completed their IRS income tax return or another tax return?  
Already completed

**You, the parents, may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.**

Check all that apply or check **None of the above**.

- 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
- None of the above

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA.

Enter your PIN and click [Link To IRS](#).

What is your (the father's/stepfather's) PIN?  
..... [Apply For A PIN](#)  
[I Forgot/Don't Know My PIN](#)

[LINK TO IRS](#)

[PREVIOUS](#) [NEXT](#)

### Help and Hints

What is your (the parent's) PIN?

A parent must enter a Federal Student Aid PIN to access the IRS Web site and request tax information.

- If you (the parent) do not already have a PIN and would like to apply for one, click "Apply For A PIN."
- If you (the parent) already

# IRS Data Retrieval Tool

Once a PIN is entered, this page will display. Click OK

**Leaving FAFSA on the Web**

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your information will be saved and your *FAFSA on the Web* session will end.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to login to open your saved FAFSA.

Click **OK** to continue. Otherwise, click **Cancel**.

If you have any questions or problems using this tool, [Contact Us](#) for assistance.



# IRS Data Retrieval Tool

You will be redirected to the IRS website. Fill in the information **exactly as filed with the IRS**. Then Click **“Submit”**

Return to FAFSA | Log Out | Help

Español

### Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information as it appears on your 2011 Federal Income Tax Return. [?](#) Required fields \*

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	*** - ** - 5342
Date of Birth *	<input type="text"/> / <input type="text"/> / <input type="text"/>
Filing Status * <a href="#">?</a>	Select One <input type="text"/>
Address - Must match your 2010 Federal Income Tax Return. <a href="#">?</a>	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) <a href="#">?</a>	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <input type="text"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One <input type="text"/>
ZIP Code *	<input type="text"/>

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

# IRS Data Retrieval Tool

After entering the required information on the previous screen, this page will be displayed. To transfer the data to the FAFSA, click the box by the Black Arrow. Then click **“Transfer Now”** by the Red Arrow.

Transferred data will be reflected on the FAFSA.

## “DO NOT ALTER THE DATA”

If the data transferred are altered, an “Official IRS Tax Return Transcript” may be required.

Copies of Federal tax returns are no longer accepted. The data must come from the IRS.

The screenshot shows the IRS.gov interface for the 'Parent <YYYY> Federal Income Tax Information' tool. It includes a table of tax data and two main options: 'Transfer My Tax Information into the FAFSA' and 'Do Not Transfer My Tax Information and Return to the FAFSA'. A red arrow points to the 'Transfer Now' button, and a black arrow points to the 'Transfer My Tax Information' option.

	My Tax Information	FAFSA Question Numbers
Tax Year	<...>	
Name (s)	<Joe & Jane Smith>	
Social Security Number	<***-**-6789>	
Filing Status	<Married-Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question <##> on the FAFSA
Adjusted Gross Income	<\$126,721>	Question <##> on the FAFSA
Income Tax	<\$31,400>	Question <##> on the FAFSA
IRS Exemptions	<5>	Question <##> on the FAFSA
Education Credits	<\$2,500>	Question <##> on the FAFSA
IRA Deductions and Payments	<\$2,500>	Question <##> on the FAFSA
Tax-Exempt Interest Income	<\$2,500>	Question <##> on the FAFSA
Untaxed IRA Distributions	<-\$2,500>	Question <##> on the FAFSA
Untaxed Pensions	<-\$2,500>	Question <##> on the FAFSA

**Transfer My Tax Information into the FAFSA**

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

**Do Not Transfer My Tax Information and Return to the FAFSA**

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.

**Transfer Now** **Do Not Transfer**

# IRS Data Retrieval Tool

Once the data retrieval is complete, the applicant will be returned to the FAFSA to complete other financial data.

Always refer to the “Help and Hints” section to clarify how to respond to each question.

The screenshot displays the IRS Data Retrieval Tool interface. It features several questions and input fields. Two blue arrows point to the text "Transferred from the IRS" which appears next to the tax year and adjusted gross income fields. The visible questions and their corresponding inputs are:

- Income tax return did you file for 2010?  (Transferred from the IRS)
- What was your adjusted gross income for 2010?  (Transferred from the IRS)
- How much did you earn from working (wages, salaries, tips, etc.) in 2010?  .00
- How much did your spouse earn from working (wages, salaries, etc.) in 2010?  .00
- Were you a dislocated worker on the day you submitted your FAFSA?
- For 2009 or 2010, did you receive benefits from any of the federal benefits programs below? Check all that apply or check None of the above.

Below the list of programs, the following options are visible:

- Supplemental Security Income (SSI)
- Food Stamps or Supplemental Nutrition Assistance Program (SNAP)

# IRS Data Retrieval Tool

Questions regarding the financial aid process may be directed to a HESAA Customer Care representative between 8:00 a.m. – 8:00 p.m., Monday through Thursday or 8:00 a.m. until 5:00 p.m. Friday at 609-584-4480. You may also contact Client Services staff via e-mail at [clientservices@hesaa.org](mailto:clientservices@hesaa.org).

The screenshot displays the FAFSA website's IRS Data Retrieval Tool. At the top, it features the FAFSA logo and the slogan "START HERE GO FURTHER FEDERAL STUDENT AID". Below the logo are navigation links for "Contact Us" and "Browse Help", along with a search bar. The main navigation bar includes tabs for "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Parent Demographics" tab is active, and the "Parent Financial Information" section is expanded. This section contains several questions: "What type of income tax return did your parents file for 2011?" (with "IRS 1040" selected), "What was your parents' adjusted gross income for 2011?" (with a text input field and an "INCOME ESTIMATOR" button), "How much did your father/stepfather earn from working (wages, salaries, tips, etc.) in 2011?" (with a text input field), "How much did your mother/stepmother earn from working (wages, salaries, tips, etc.) in 2011?" (with a text input field), and "As of today, is either of your parents a dislocated worker?" (with a "Select" dropdown menu). A large blue arrow points from the "Parent Financial Information" section to the "Help and Hints" sidebar. The sidebar contains a "Parents' Type of 2011 Tax Form Used" section with a dropdown menu set to "Question 80". Below this, there is explanatory text and a list of options: "IRS 1040", "IRS 1040A or 1040EZ", "A foreign tax return", and "A tax return for a U.S. territory or a Freely". At the bottom of the form, there are buttons for "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT".