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.

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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.

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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.

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

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

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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.

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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.

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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.

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