

I.R.S. Data Retrieval Process

Overview

Officials in the Office of Federal Student Aid and the Internal Revenue Service have worked together to develop a process to simplify the steps that families must take each year to complete the Free Application for Federal Student Aid ("FAFSA")

Federal Student Aid staff have redesigned the "FAFSA on the Web" site to simplify the application process for applicants.



This tutorial will introduce you to the new "IRS DATA RETRIEVAL TOOL" ("DRT") that is now available on 2011-2012 Free Application for Federal Student Aid ("FAFSA") website as of January 31, 2011.

The Department of Education randomly selects a certain percentage of applications each year for schools to verify that the data provided on the FAFSA application is accurate. Learn more about the verification process

The benefit (to families) of utilizing the IRS Data Retrieval Process is that it will greatly simplify and expedite the verification process. You will no longer have to submit complete copies of your federal tax returns to our office before we can finalize your federal aid eligibility.

How This Will Work on the 2012-2013 FAFSA

The "IRS Data Retrieval" process for the 2012-2013 academic year is tentatively scheduled to be available starting February 1, 2012

- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after the return has been filed,
- Data from paper tax returns will be available in 6-8 weeks.

All 2012-2013 FAFSA On The Web applicants, and the parents of dependent applicants, who indicate that they have filed their federal tax returns prior to completing their FAFSA and who are otherwise eligible will be directed to use the FAFSA-IRS Data Retrieval process to complete their FAFSA more easily and accurately.

Applicants who chose not to use the FAFSA-IRS Data Retrieval process, or who retrieve IRS data but subsequently change it, will be informed that they will need to explain to their institutions why information they provided is more accurate than the information that would have been obtained directly from the IRS. They will need to provide information obtained directly from the IRS.

In general, all applicants who have already filed but elect to not use the retrieval process will be subject to being selected for verification based upon the risk they pose to federal funds and, if they are selected, will be required to support their reported FAFSA data with information obtained directly from the IRS.

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Free Application for Federal Student Aid

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Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

Parent Tax Information

Application was successfully saved.

For 2010, have your parents completed their IRS income tax return or another tax return?
Already completed

View and Transfer your 2010 Tax Information from the IRS. [How it works](#)
You, the parent, may link to the IRS and view your 2010 tax information. You will also have the option to securely transfer your information into this FAFSA.

Note: If you recently filed your taxes, your IRS information may not be available yet. If you filed your taxes electronically, it may take 1-2 weeks; but if you filed your taxes via the mail it may take 6-8 weeks. You can use your personal copies of your tax returns and complete the FAFSA. You could also wait until your IRS information becomes available before submitting your FAFSA, but you should keep in mind any [deadlines](#).

Enter your PIN and click **Link To IRS**.

Which parent are you? Select

Click **Skip This Option** if you do not want to use this tool.
SKIP THIS OPTION

If your 2010 IRS tax filing status is [married filing separately](#), you filed an [amended tax return](#), or you filed a [foreign tax return](#), we recommend that you **Skip This Option**.

PREVIOUS NEXT


NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints
Which parent are you?
This question is used to determine which parent is providing a PIN in order to access the IRS Web site.

- Select **Father / Stepfather** if you are the student's father / stepfather.
- Select **Mother / Stepmother** if you are the student's mother / stepmother.

Families 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.

The page at https://fafsaed.gov says:

 You are now leaving FAFSA on the Web and will be linked to the IRS Web site to view your IRS tax information. If you click 'OK' your FAFSA will be saved and your current session will end.

Your saved FAFSA will automatically open when you transfer your information from the IRS. If you do not transfer your information from the IRS, you will have to login to open your saved FAFSA.

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

If you have questions or problems using this tool, contact Federal Student Aid's [Customer Service](#).

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 <2008> Federal Income Tax Return. [?](#)

Required fields*

First Name*	<input type="text" value="Joe"/>
Last Name*	<input type="text" value="Smith"/>
Social Security Number*	*** - ** - 6789
Date of Birth*	01 / 04 / 1990
Address* ?	<input type="text"/>
	<input type="text"/>
Apt. Number (Required if it appears on your tax return)	<input type="text"/>
Country*	United States <input type="button" value="v"/>
City, Town or Post Office*	<input type="text"/>
State/ U.S. Territory*	Select One <input type="button" value="v"/>
ZIP Code*	<input type="text"/>
Filing Status*	Select One <input type="button" value="v"/>

Applicants will need to authenticate their identity before any person information is displayed.

Parent <YYYY> Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers ?
Tax Year	<2008>	
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

Print this page for your records before choosing an option below.

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.

[Transfer Now](#) [?](#)

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.

[Do Not Transfer](#) [?](#)

Tax data will be presented and the applicant will have the option to "Transfer" the tax information to the FAFSA. Applicants can also choose NOT to transfer the data to the FAFSA.

Transferred data will have a notation - "Transferred from the IRS"

Remember,

- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after the return has been filed,
- Data from paper tax returns will be available in 6-8 weeks.

FAFSA Corrections

We know that many will not have their federal tax returns completed at the time they submit the FAFSA. A student can use "estimated income" information on the initial FAFSA and students/parents will be able to use this process once their tax returns are completed.

Using emails and other communications, starting around April 1, 2012, Federal Student Aid will remind applicants that once they have filed their income tax return they should use the FAFSA corrections process to update their FAFSA using the FAFSA-IRS Data Retrieval process. Subsequent messages will be sent every 45 days until mid-September then every 60 days until the end of the processing cycle.

- Click on the link in the middle of the page "Make FAFSA Corrections"

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Welcome, Needy Logout

SEARCH

My FAFSA

Welcome, Needy Student

2011-2012 2010-2011

Current Application Status: Processed Successfully

Your application was processed successfully.

You should review it for accuracy.

VIEW PROCESSED INFORMATION

Original Application
Submitted: 01/01/2011
Processed: 02/21/2011
DRN: 7167

You can also:

- [Make FAFSA Corrections](#)

Federal Student Aid PIN

PIN Status: Active [Request A Duplicate PIN](#)

You can use your PIN to sign your FAFSA electronically or make corrections to your FAFSA.

NEED HELP?

Site Last Updated: Friday, November 12, 2010

[Privacy](#)

Some Families Will Not Be Able to Use This Tool

- A married independent applicant and spouse who filed separate tax returns;
- When the parents of a dependent student filed separate tax returns.
- An applicant or applicant's parent who have had a change in marital status after the end of the tax year on December 31, 2011.
- The applicant, or parent or spouse, as applicable, who have filed an amended tax return will not be able to use the "DRT". These families should contact the financial aid office for more information.