

Using the FAFSA IRS Data Retrieval Tool

What is the IRS Data Retrieval Tool? The IRS Data Retrieval Tool allows financial aid applicants to upload the previous year's federal tax data from the IRS to the Free Application for Federal Student Aid (FAFSA). This service is available beginning February 1.

How do families access the IRS Data Retrieval Tool to complete the FAFSA? When completing the online FAFSA (located at fafsa.ed.gov), the IRS Data Retrieval Tool can be accessed in the "Financial Information" section of the application. Students who have already submitted an initial FAFSA will first need to select the "Make FAFSA Corrections" option. The IRS Data Retrieval Tool will only be available after the student or the student's parent(s) indicates that the federal tax return has already been completed.

What is the process to upload the federal tax data? The parent or student will be required to provide the Federal Student Aid (FSA) Personal Identification Number (PIN). If the parent or student does not yet have a PIN, he/she may apply for it at this point. The PIN is also used to electronically sign the FAFSA. After supplying the PIN, the applicant will be transferred to the IRS website where identification is validated, including the exact address on record with the IRS. If a successful match is made, the federal tax data will be displayed on the screen and can then be transferred to the FAFSA.

Who can use the IRS Data Retrieval Tool? After electronically filing federal taxes, tax data should be available to access through the IRS Data Retrieval Tool within two weeks. Tax data should be available within 6 to 8 weeks if the tax return is mailed. Parents or students who filed an amended or foreign tax return, *married individuals* who filed with a head of household or married filing separately tax status, and anyone who had a change of marital status after the end of the tax year will be unable to use the IRS Data Retrieval Tool. The Tool is also available only to taxpayers who have a valid Social Security number. Taxpayers who file tax returns using a Tax ID Number (TIN) will not be able to use the Tool.

What the FAFSA is due before taxes are completed? Students should always make sure to meet colleges' financial aid deadlines. If the FAFSA is due before the completion of tax returns, parents and students should estimate federal tax data on the FAFSA. After taxes are complete, families can update the FAFSA with actual tax data using the IRS Data Retrieval Tool.