

IRS Data Retrieval Tool

It is no longer sufficient to provide a photocopy of the federal income tax return and W-2(s). The US Department of Education is requiring applicants to provide a copy of their federal income tax returns directly from the IRS to prevent fraud. In the past, some applicants have supplied false copies of their federal income tax returns during verification.

The IRS Data Retrieval Tool allows you and/or your parents who have already filed federal income tax returns to prefill the answers to some questions on the [Free Application for Federal Student Aid \(FAFSA\)](#) by transferring data from federal income tax returns. This can save you some time in completing the FAFSA. It may also reduce the likelihood that your FAFSA will be selected for verification.

Obviously, you and/or your parents must have filed federal income tax returns before using the IRS Data Retrieval Tool. The IRS Data Retrieval Tool can be used 1-2 weeks after filing an electronic federal return and 6-8 weeks after filing a paper return.

How Does the IRS Data Retrieval Tool Work?

While completing an original online FAFSA or updating an existing FAFSA, you will be provided with an opportunity to use the IRS Data Retrieval Tool. You may be asked a few screening questions to determine your eligibility to use the tool. Eligible applicants who choose to use the tool will be temporarily transferred to the IRS web site, where identity authentication questions will be asked (i.e., prove that they are who they say they are). **The home address listed on the FAFSA must match the home address listed on the federal income tax return.** If it does not match, the IRS Data Retrieval Tool will not import the tax information.

After the applicant has authenticated himself or herself, the IRS web site will display the data to be transferred to the FAFSA. The applicant may then choose whether or not to transfer the data. If the applicant chooses to transfer the data, the applicant will have an opportunity to update the data, if necessary. (An applicant who transfers the data unmodified may reduce the likelihood that their FAFSA will be selected for verification.) The applicant will then be returned to the FAFSA web site to complete the FAFSA.

Who Can Use the IRS Data Retrieval Tool?

If an independent applicant is married and files separate federal income tax returns or a dependent applicant's parents are married and file separate federal income tax returns (e.g., married filing separately or head of household), the applicant will not be able to use the IRS Data Retrieval Tool. Also, if there has been a change in the marital status of the applicant or parent (if the applicant is a dependent student) after the end of the tax year, the applicant will not be able to use the IRS Data Retrieval Tool.

The IRS Data Retrieval Tool will transfer information only from an original income tax return and not an amended income tax return. Thus if you or your parent, as applicable, has filed an amended income tax return, you will not be able to use the IRS Data Retrieval Tool. Also, if you and/or your parents filed a foreign income tax return instead of or in addition to a US income tax return will not be to use the IRS Data Retrieval Tool. Also, the IRS Data Retrieval Tool is available only to taxpayers who have a valid Social Security number. Taxpayers who file income tax returns using a Tax ID Number (TIN) will not be able to use the tool.

What if I Can't Use the IRS Data Retrieval Tool?

If for any reason you and/or your parent cannot use the IRS Data Retrieval Tool, you can request tax transcripts one of the following ways:

1. Visit your local IRS Tax Office located at 2835 South Charles Blvd., Greenville, NC 27858.
2. Electronically by visiting the IRS website <http://www.irs.gov/individuals/article/0,,id=232168,00.html?portlet=105>
3. By calling 1-800-908-9946 and request a transcript to be faxed or mailed to you.
4. Complete IRS Form 4506-T Request for Transcript of Tax Return (this form must be printed and mailed to the IRS and could take up to 30 days to be received and processed by the IRS).