

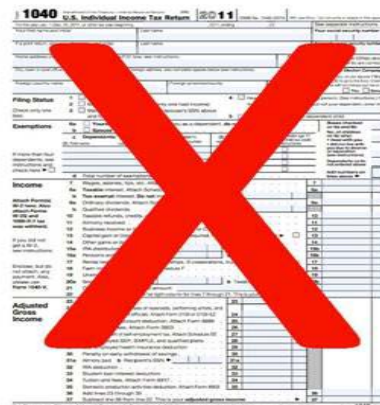


## IRS Data Retrieval Tool

The IRS Data Retrieval Tool allows applicants who have already filed their federal income tax returns to prefill or correct the answers to some questions on the [Free Application for Federal Student Aid \(FAFSA\)](#) by transferring data from their federal income tax returns.

**If an applicant does not use the IRS Data Retrieval Tool and the applicant's FAFSA is selected for verification, the applicant will be required to complete IRS Form 4506-T, [Request for Transcript of Tax Return](#), during verification. It is no longer sufficient to provide a photocopy of the federal income tax return (Form 1040, 1040A or 1040EZ).**

The US Department of Education is requiring applicants to provide their federal income tax information directly from the IRS to prevent fraud. In the past, some applicants have supplied false copies of their federal income tax returns during verification. If you are unable to use the IRS Data Retrieval Tool, you can [request the tax transcript electronically](#) or by calling 1-800-908-9946. It can take up to 30 days to process a paper copy of IRS Form 4506-T.



### When Can One Use the IRS Data Retrieval Tool?

The IRS Data Retrieval Tool can be used when filing or correcting your FAFSA. If an applicant files the FAFSA based on estimated income data (e.g., based on the last pay stub of the year and W-2 and 1099 statements), the applicant can use the IRS Data Retrieval Tool after filing his/her federal income tax returns to update the FAFSA form. Given that some states and colleges have very early deadlines, before most families would be able to file their federal income tax returns, it seems likely that the IRS Data Retrieval Tool will be used most often to update the FAFSA form after the family has filed their federal income tax returns.

Obviously, applicants must have filed their federal income tax returns before they can use the IRS Data Retrieval Tool. The IRS Data Retrieval Tool can be used 1-2 weeks after the federal income tax return is filed if the return is filed electronically 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, eligible applicants will be provided with an opportunity to use the IRS Data Retrieval Tool. Applicants may be asked a few screening questions to determine their eligibility to use the tool.

Eligible applicants who choose to use the tool will be temporarily transferred to the IRS web site, where they will be asked a few questions to authenticate themselves (i.e., prove that they are who they say they are).

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; however changing the data will result in additional document requests from USD to verify the accuracy of those changes. The applicant will then be returned to the FAFSA web site where they will complete the rest of the FAFSA.

### **Who Can Use the IRS Data Retrieval Tool?**

Applicants must have a valid Social Security Number and FAFSA PIN to use the IRS Data Retrieval Tool. The applicant will need to authenticate himself or herself to the IRS in order to use the IRS Data Retrieval Tool. Students and parents must use the tool separately for their respective income tax returns.

### **Who Can't 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 the applicant, spouse or parent, as applicable, has filed an amended income tax return, the applicant will not be able to use the IRS Data Retrieval Tool.

Applicants who have filed a foreign income tax return instead of or in addition to a US income tax return will be unable to use the IRS Data Retrieval Tool. For example, taxpayers who file both a US income tax return and a Puerto Rican tax return will be unable 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.

The home address listed on the FAFSA must match the home address listed on the federal income tax return.