Instructions for using the IRS Data Retrieval tool

Follow these steps if you did not originally request IRS Data Retrieval transfer to your FAFSA.

1. Log into your FAFSA (www.FAFSA.gov) and click on “Start Here” (If already completed and making corrections click on “Make Corrections to a Processed FAFSA” after you sign in)

2. Enter all required information. The IRS Data Retrieval tool will appear at the “Financial Information” section of the FAFSA.
3. You will be prompted to answer “For 2011, have your parents completed their IRS income tax return or another tax return?” There is a drop down box that will allow you to pick one of three options: will file, not going to file and already completed.

Select “Already completed”, this will prompt the following questions:

If you select one of the following responses:
- as Married Filing Separately
- as Head of Household
- an amended tax return
- a Puerto Rican or foreign tax return

You will get a response of “Based on your response, you are not eligible to transfer your information from the IRS into this FAFSA.”

If you select:
- You, the parents, recently filed taxes

You will get a response of “If you filed your taxes electronically within the last 2 weeks or if you filed your taxes by mail within the last 8 weeks, your tax information may not be available yet from the IRS. You can determine if you should attempt to access your tax information from the IRS at this time.”

If you select:
- None of the above

You will get a response of “Based on your response, we recommend that you transfer your information from the IRS into this FAFSA.”

You will then be prompted to select a parent and enter their respective PIN number. Then click [LINK TO IRS].
Your FAFSA will then be saved and a site exit message will display:

4. On the IRS web site enter all requested information.
Once the IRS validates your identification your IRS tax information will display. You will then be given the option to transfer your information or return to the FAFSA where you will be asked to manually enter your information. If your FAFSA is chosen for verification and you or your parent chooses not to use the IRS data retrieval process or did retrieve IRS data and subsequently manually change it you must provide your IRS Tax Return Transcript obtained directly from the IRS. Schools can no longer accept photocopied Federal tax returns.

5. After clicking **Transfer Now** you will get a response that reads “You have successfully transferred your 2011 tax information.”

The data that will be retrieved, if applicable, includes:
- Adjusted gross income
- Taxes paid
- Number of exemptions
- Education credits
- Untaxed portion of IRA distributions and pensions

The following information will not be retrieved and must be manually added to the FAFSA if applicable:
- Earned income (Box 1 on W-2 statements)
- Self-employment income (Line 12 or 18 of your Tax Return. If negative, enter zero)
- Earned income from partnership (Form 1065: Box 14, Code A of Schedule K-1)
- Payments to tax-deferred pensions (Box 12a – 12d codes D, E, F, G, H and S)
- Child support received or paid

6. **You are NOT DONE!!** Be sure to complete the sign and submit section and electronically sign with your PIN numbers. You are not finished until you have received a confirmation number and Expected Family Contribution (EFC) number. To complete verification you must also submit a signed copy of the verification worksheet.