

IRS Data Retrieval Tool on the FAFSA



What is the IRS Data Retrieval Tool? When completing the Free Application for Federal Student Aid (FAFSA), student and parents are required to provide details about their income. For most people, this includes data from the previous year's federal tax returns. To streamline the application process parents and students may transfer required federal tax data from the IRS to their FAFSA by using the IRS Data Retrieval Tool (DRT). **Please review the step-by-step instructions on the back.**

How do I access the IRS Data Retrieval Tool? When completing the online FAFSA, www.fafsa.gov, the IRS DRT can be accessed in the "Financial Information" section of the application. It will only be available if the student or the parent(s) indicate they have already completed their federal tax return for the year.

Who can use the IRS Data Retrieval Tool? After electronically filing your federal taxes, the data should be available to access through the IRS DRT within 3 weeks. It may take up to 8 to 11 weeks for the data to be available if the tax return was completed on paper. Also, there are certain tax filing statuses that make students or parents unable to use the tool. These statuses include:

- Parent or student filed as Married filing separately
- Parent or student filed as Married Head of Household
- Parent or student filed an amended tax return
- Parent or student filed a Puerto Rican or foreign tax return.

What is the process to transfer my federal tax data? If you are eligible to use the IRS DRT, the parent or student will be required to provide their Federal Student Aid ID (FSA ID) number. If you don't have your FSA ID number you may apply for it at this point. You are then transferred to the IRS website where identification is validated, including your exact address on record with the IRS. If a successful match is made, your federal tax data will be displayed and you can then transfer the data directly to your FAFSA. **Do not make any adjustments to the transferred data or it will delay the processing of your financial aid application.** **Please review the step-by-step instructions on the back.**

What if I need to complete the FAFSA before my taxes are completed? You may estimate your federal tax information for the FAFSA to meet your financial aid application due date. After you complete your tax return you will be able to update your FAFSA with actual tax data—see next paragraph.

How do I use the IRS DRT to update my federal tax data on the FAFSA? Log into your FAFSA by visiting www.fafsa.gov and entering the student's identifying information. Then click "Make FAFSA Corrections" and enter the student's FSA ID number and password. Review each section of the application, verifying that all initially reported information is correct and make corrections if necessary. If you initially estimated your federal tax data, in the "Financial Information" section, change your tax filing status from "will file" to "already completed." The IRS DRT will then be available to use.

Tips and reminders:

- In most cases, financial aid offices are no longer able to use data from actual tax returns to verify FAFSA data. We can only use data coming directly from the IRS through the use of the DRT or from an IRS Tax Return Transcript.
 - The financial aid office does not require copies of federal tax returns for Continuing students (current or on leave) or for their parent(s). If a tax return is provided to us and if the information on the tax return is found to be different from the data on the FAFSA then we will request the DRT or an IRS Tax Return Transcript which will delay the processing.
 - If the financial aid office is requesting an IRS Tax Return Transcript from you and if you are eligible to use the IRS DRT you may use the IRS DRT instead of providing us a copy of the Transcript.
 - If you use the IRS DRT do not make any changes to the data that is transferred. If you do make changes you will need to provide us with an IRS Tax Return Transcript and it will delay the processing of your financial aid.
 - If you are not eligible to use the IRS DRT because your tax status is one of the first three excluded tax statuses listed in the third paragraph above, the financial aid office may request an IRS Tax Return Transcript from you.
- Do not provide the financial aid office an IRS Tax Return Transcript unless we specifically request it.**
- If you filed an amended tax return you may need to provide the financial aid office a signed copy of the original tax return and a signed copy of the 1040X return.
 - Visit <http://financialaid.hampshire.edu> for instructions on how to request an IRS Tax Return Transcript.
 - If you have any questions about the IRS Data Retrieval Tool or about IRS Tax Return Transcripts please call the financial aid office at 413.559.5484.

Instructions to use the IRS Data Retrieval Tool (DRT) on the FAFSA

Follow these instructions if you originally estimated income and tax data on the FAFSA and if tax returns for your parent(s) and/or yourself are now filed. You may also use these instructions as a guide if you are completing the FAFSA for the first time and if you are eligible to use the Data Retrieval Tool.

Step 1: Go to www.fafsa.gov and click on “Login.”

Step 2: Enter your student information and click “Next.”

Step 3: Click on “Make FAFSA Corrections.”

Step 4: Enter your FSA ID number. If you don’t know or can’t remember your FSA ID, click the “I Forgot/Don’t Know My FSA ID” link or visit <http://www.pin.ed.gov> and request a duplicate number. Create and enter a password and click “Next.”

Step 5: Click on the “Financial Information” tab. Select “Already Completed” for the tax return filing status and answer the eligibility questions. These questions include:

- Did you file an amended tax return?
- Did you file a Puerto Rican or foreign tax return?
- Did you file your taxes electronically in the last 3 weeks (or by mail in the last 8 weeks)?

Step 6: If you are eligible to use the IRS DRT you will be prompted to enter your FSA ID number and then click “LINK TO IRS.”

NOTE: If you are not eligible to use the IRS Data Retrieval Tool, and if the financial aid office needs to verify your income, you will need to request an IRS Tax Return Transcript. Visit <https://financialaid.hampshire.edu> for instructions on how to request an IRS Tax Return Transcript. If you are eligible to use the IRS Data Retrieval Tool continue with Step 7.

Step 7: Click “OK” to leave the FAFSA website and enter the IRS Data Retrieval Tool website.

Step 8: Click “OK” to accept the IRS Data Retrieval Tool terms of use.

Step 9: Enter the requested information and click “Submit.” Remember to enter your address exactly as it appeared when you filed your taxes.

NOTE: You may need to re-enter parts of your address if there is an error preventing you from going forward. For example, if your address is 123 Main Street try entering Street or St. It is best to have a copy of your tax return in front of you when using the Data Retrieval Tool so you can enter the exact data.

Step 10: If you were able to move to the next page, review the information that the IRS has retrieved from your tax return. Check the box to “Transfer My Tax Information into the FAFSA” and click “Transfer Now.” Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.

Step 11: Do not update any answers that say “Transferred from the IRS;” if you make any changes you may need to provide the financial aid office with an IRS Tax Return Transcript. Answer the question(s) asking how much was earned in wages, salaries, and tips, and click “Next.”

NOTE: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financial Information Section and once under the Parent Financial Information section.

Step 12: Click on the “Sign & Submit” tab at the top of the page. Enter your FSA ID number and click “Sign.” Then agree to the Terms of Agreement and click “Submit My FAFSA Now.”

Remember to print or save the confirmation page for your records.