

HOW TO USE THE DATA RETRIEVAL TOOL ON YOUR FAFSA

The Data Retrieval Tool is a great resource to use while filling out the FAFSA. Utilizing this option saves on time and helps to eliminate mistakes. Also, it is mandatory if you are selected for verification.

When using the Data Retrieval Tool, all your tax information is directly pulled from the IRS database.

No need to plug in numbers or get copies of your tax returns!

1. Log into your FAFSA at www.fafsa.ed.gov. You may select *FAFSA Renewal* or complete a *New FAFSA*.
2. When you come to the tab for **Financial Information**, select **Already Completed** your IRS Income Tax Return.
3. On the next question, select the appropriate tax filing status. Ex: Single, Married-Filed Jointly.
4. You may be able to use the Data Retrieval Tool if you answer **No** to all the questions asked – Did you file an amended tax return? Did you file a foreign tax return? Did you file in the last three weeks?
5. If you answered no to the above questions, click on **Link to IRS**.
6. Select **OK** when it asks if you want to leave FAFSA on the Web.
7. On the IRS site, you will have to provide your filing status, name and address exactly as it was listed on your tax return. (If you are having trouble matching your address, go to www.usps.com, use the *Look Up a Zip Code* option, type your street address, city, state and zip and hit *FIND*. Use the “standard” address that is displayed).
8. Click on **Submit** and it will show you the information that will be transferred. (If it did not work than the address you provided is probably incorrect according to the IRS’ records. You may try again but you will be locked out after three failed attempts).
9. Check the **Transfer my Tax Information into the FAFSA** box and then click the **Transfer Now** button.
10. Once the information has been transferred, do not make any changes!
11. Enter the information for your wages and click **Next**.
12. Again, any information **transferred by the IRS** should not be changed. If selected for verification, this will delay your financial aid being processed.
13. Finish filling out your FAFSA, sign and submit.

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- You may not be eligible to use the IRS Data Retrieval if:
 - You filed your tax return within the past two weeks
 - You filed an amended tax return
 - Your filing status is “Married Filing Separately”
 - You filing status is “Head of Household” and you actually are married (but not separated or divorced).
 - If you are unable to transfer your tax information using the Data Retrieval Tool, you will need to use copies of your tax returns to fill out the FAFSA. If you need the Data Retrieval Tool completed for verification purposes, you will need to request a tax return transcript.
 - If you are still having trouble with using the Data Retrieval, call the FAFSA hotline at 1-800-433-3243.