



# How to Use the IRS Data Retrieval Tool

## SELECTED FOR VERIFICATION?

If you have been selected for verification, you will need to submit additional documentation to verify income. One option is to use the IRS Data Retrieval Tool in the Free Application for Federal Student Aid (FAFSA).

The IRS Data Retrieval Tool allows students and parents to access the IRS tax return information needed to complete the FAFSA. Students and parents may transfer the data directly into their FAFSA, when initially completing the FAFSA, or when making a correction. Filers must wait 2-3 weeks after filing electronically (or up to 8 weeks after filing by mail) in order to successfully use the IRS Data Retrieval Tool. If the retrieved data is not changed, then an IRS tax transcript may not be required.

## HOW TO USE THE IRS DATA RETRIEVAL TOOL

1. If you have already submitted the FAFSA you will log in and submit a correction. In the “Financial Information” section of the FAFSA, select that you have “Already Completed” your tax return. A series of questions will appear to determine if you are able to use the IRS Data Retrieval Tool. If available, it will populate a “Link to IRS” button. Click this to continue.

For 2013, have you completed your IRS income tax return or another tax return?  
 Not completed  **Already completed**

For 2013, what is your tax filing status according to your tax return?  
 Single  Married-Filed Joint Return  Married-Filed Separately  Head of Household  Qualifying Widow(er)

**You may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.**

Did you file an amended tax return?  
 Yes  No

Did you file a Puerto Rican or foreign tax return?  
 Yes  No

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?  
 Yes  No

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA.

[LINK TO IRS](#)

2. You will then see a “Leaving FAFSA on the Web” notification. Click “OK.”

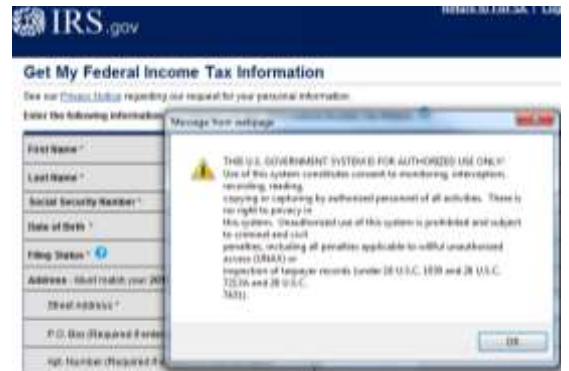
**Leaving FAFSA on the Web**

You are now leaving FAFSA on the Web and will be transferred to the IRS Web site to access your IRS tax information. Your information will be saved and your FAFSA on the Web session will end.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose not to return to FAFSA on the Web from the IRS Web site. If you do not transfer your information or choose not to return to FAFSA on the Web from the IRS Web site, you will have to log in to open your saved FAFSA.

Click OK to continue. Otherwise, click Cancel.

If you have any questions or problems using this tool, view available [help](#) options for assistance.



3. Once you are in the IRS system, you will see a warning pop up (shown below). You must click “OK” to continue with the data retrieval. Then, fill in the required information and click “Submit.”
4. Next, you will see two options: “Transfer My Tax Information into the FAFSA” or “Do not transfer my tax information.” Select the transfer option.

Tax-Exempt Interest Income	<input type="checkbox"/>	Question 45d on the FAFSA
Unfunded IRA Contributions	<input type="checkbox"/>	Question 45e on the FAFSA
Unfunded Pensions	<input type="checkbox"/>	Question 45f on the FAFSA

Print this page for your records before choosing an option below.

**Transfer My Tax Information into the FAFSA**

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

**Do Not Transfer My Tax Information and Return to the FAFSA**

By clicking the “Go Back Transfer” button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.



WHITMAN COLLEGE™

## How to Use the IRS Data Retrieval Tool

5. Once you have selected the transfer option, it will take you back to the FAFSA with a notification across the top stating: **You have successfully transferred your IRS tax information.** You can then complete the remainder of your FAFSA, but be sure not to change any of the financial information transferred from the IRS! Any changes made to the IRS transferred data will be flagged for review with an indicator that the information has been changed. Submit the correction and you are done!