WHITMAN COLLEGE™

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.
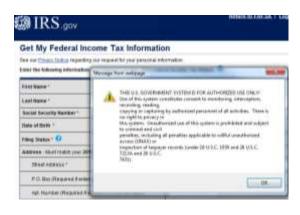
HOW TO USE THE IRS DATA RETRIEVAL TOOL

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.
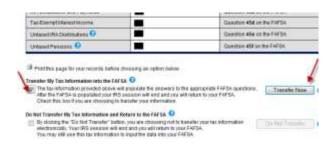

3. Once you are in the IRS system, you will see a warning pop up (shown below). You must click "OK" to continue with the data retrieval. Then, fill in the required information and click "Submit."

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.

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

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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!