

IRS Data Retrieval Tool

You now use prior-prior tax year information for filing the FAFSA. You will use 2019 income and tax information for the 2021– 2022 FAFSA. Using the IRS Data Retrieval Tool allows you to transfer your tax information directly into the FAFSA. However, some applicants are ineligible to use the IRS Data Retrieval Tool after the FAFSA screening questions, and therefore, must request a tax transcript from the IRS.

What is needed?

- Student's Social Security number and date of birth
- FSA ID and passwords for both student and parent (if applicable)
- Copy of students and parent's income taxes / W-2s

IRS Data Retrieval Process

- When entering income information on the FAFSA, chose "Already Completed" as your income tax filing status.
- Answer the filtering questions to determine if you are eligible to use the IRS Data Retrieval Tool.
- If eligible, you and or your parent will be asked to enter his/her FSA ID and password before linking to the IRS website.
- Follow the onscreen instructions to complete the process. After the IRS has validated your identification, your IRS tax information will display. You can transfer your information from the IRS site onto your FAFSA application. You will know that your federal tax return information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA form. Note: Be sure to enter your address exactly as it appears on the tax return.
- Once the data retrieval is complete, check each field for accuracy and complete any questions requiring information not transferred from the IRS. **Note: Do not change any data transferred from the IRS.**
- Submit your FAFSA.