IRS Data Retrieval Tool

Students and parents who have filed their 2014 IRS tax return will be able to select the IRS Data Retrieval option on the Free Application for Federal Student Aid (FAFSA) to transfer tax information to the FAFSA. We strongly encourage you to select this option during the initial filing or when subsequent corrections are made to your 2015-2016 FAFSA. This option will streamline and expedite the processing of your financial aid application.

To successfully use this option you must:
- Have a federal tax return filed with the IRS.
- Have a valid social security number.
- Have a Federal Student Aid (FSA) ID.
- The FSA ID, which consists of a user-created username and password, replaced the PIN effective May, 2015. It allows users to electronically access personal information on Federal Student Aid Web sites as well as electronically sign a FAFSA. Both parents & students can get a FSA ID at https://fsaid.ed.gov/npas/index.htm. Students will be prompted to create a FSA ID when signing on to their FAFSA.

You will be unable to use the IRS Data Retrieval option if:
- Your marital status changed after December 31, 2014.
- You filed married filing separately.
- You filed an amended return.
- You filed a foreign tax return.
- You filed a tax return using a Tax ID Number (TIN).
- The home address on the FAFSA does not match the address on the tax return.

Once you have completed your taxes, wait the appropriate length of time (2-3 weeks after electronically filing a tax return or 6-8 weeks after filing paper tax returns)* and follow these steps:

1. Go to fafsa.ed.gov and select the “Start Here” button
2. The student must log in using their student FSA ID
3. Select the “Continue” or “Make a Correction” button
4. Select the “Financial Information” tab from the top of the page.

Instructions for the parent to request the parent tax information using the IRS Data Retrieval:

1. Go to “Parent Financial Information” page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible for IRS data retrieval, enter the FSA ID for the parent providing the information
4. Click “Link to IRS”
5. Review the information displayed and select the “Transfer My Information into the FAFSA” option
6. Proceed to the Sign and Submit page

Instructions for the student to request the student tax information using the IRS Data Retrieval:

1. Go to “Student Financial Information” page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, click “Link to IRS”
4. Review the information displayed and select the “Transfer My Information into the FAFSA” option
5. Proceed to the Sign and Submit page

*If you owed taxes on your 2014 Federal Tax Return, then you cannot access the IRS Data Retrieval Tool until after April 15th.