

# IRS Data Retrieval Tool

Beginning February 1, 2012, students and parents who have filed their 2011 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 2012-2013 FAFSA. This option will streamline and expedite the processing of your financial aid application. According to the IRS, this tool cannot be used until 1-2 weeks after electronically filing a tax return and 6-8 weeks after filing paper tax returns.

When either a parent or student selects the IRS Data Retrieval option, the FAFSA Central Processing System (CPS) will conduct a data match with the IRS. As the federal income tax filer, you will be redirected to a secure IRS website, where you will permit the IRS to transfer income data to the FAFSA. Data that is successfully matched will be marked on the FAFSA with the following notation, "Transferred from the IRS." It's as simple as that. This process avoids reporting errors and processing delays that can otherwise occur when the option is not selected.

If your FAFSA is selected for **verification**, and you or your parent (if applicable) did not use the IRS Data Retrieval option, you should go to [www.FAFSA.gov](http://www.FAFSA.gov), log into your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you or your parent are eligible to use the IRS Data Retrieval tool to transfer the 2011 IRS income tax information. Some reasons that you may not choose this option are if:

- a) Your (or your parent's) marital status changed after December 31, 2011
- b) You (or your parent) filed married filing separately
- c) You (or your parent) filed an amended tax return
- d) You (or your parent) filed a foreign tax return.

If you are unable to choose this option, then you must submit to the Financial Aid Department **2011 IRS Tax Return Transcript(s), NOT photocopies of the income tax returns.**

To obtain an **IRS Tax Return Transcript**, go to [www.IRS.gov](http://www.IRS.gov), and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.