



2012-2013 IRS Data Retrieval Process

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Beginning in January 2012, most 2012-2013 FAFSA applicants, and parents of dependent applicants, who indicated that they have filed their federal tax returns will be directed to use the FAFSA-IRS Data Retrieval Process to complete their 12-13 FAFSA more easily and accurately.

If you are eligible to use the IRS Data Retrieval Process you are strongly encouraged to use this tool. Starting with the 2012-13 FAFSA, schools are ***no longer permitted*** to accept federal tax returns to satisfy verification requirements. If you are selected for verification and ***did not*** use the IRS Data Retrieval Process, you will be required to submit an IRS Tax Transcript. See the instructions for ordering a Tax Transcript from the IRS.

Instructions for submitting your initial FAFSA

The IRS Data Retrieval tool will appear in the “Financial Information” section of the FAFSA.

1. Enter your PIN and click **Link to IRS**.
2. Your FAFSA will be saved and you will be transferred to the IRS Web site.
3. On the IRS Web site, enter the requested information and click submit.
4. Once the IRS has validated your identification, your IRS tax information will display. You can either transfer your information from the IRS, or choose to return to FAFSA on the Web from the IRS Web site. If you do not transfer your information or choose not to return from the IRS Web site, you will have to login to open your saved FAFSA. Remember, if you choose not to use the IRS Data Retrieval process, you may be required to send in an IRS Tax Transcript (schools can no longer accept Federal Tax returns).
5. If you transfer your IRS tax information, questions that are populated with tax information will be marked with “Transferred from the IRS.”

If you recently filed your tax return (electronically within the past two weeks or by mail within the past 8 weeks) or have not yet filed your federal tax return, you will not be able to use the IRS Data Retrieval Process at the time you filed your FAFSA. Once you have filed your tax return and/or the appropriate amount of time has elapsed, you will need log back into your FAFSA and update your FAFSA using the IRS Data Retrieval process.

Instructions for Corrections and Updates to your FAFSA

Once you have completed your taxes, wait the appropriate length of time (two weeks if filed electronically and 8 weeks if by mail) and follow these steps:

1. Log back into www.fafsa.gov.
2. Click on Make FAFSA Corrections.
3. Click on Financial Information tab.
4. Change from “Will File” to “Already Completed”.
5. If you are eligible to use the IRS Data Retrieval Process, click on the Link to IRS link and click OK.
6. On the IRS Web site, enter the requested information and click submit.
7. Click the box under the “Transfer My Tax Information into the FAFSA” and then click Transfer Now
8. You should then receive a message “You have successfully transferred your 2011 tax information”.
9. Be sure to finish going through all the steps and electronically sign (if dependent student one of your parents also needs to electronically sign) and submit your FAFSA. You are not finished until you have successfully submitted your FAFSA and received a confirmation number.

There are a few situations in which you are unable to use the IRS Data Retrieval Process. In these cases, if you are selected for verification, you will need to submit an IRS Tax transcript. (See instructions)

1. Married and filing separately – submit transcript for each spouse
2. Filed an amended tax return
3. Filing a Puerto Rican or foreign tax return
4. Had a recent change in marital status