

IRS Data Retrieval Tool

What is the IRS Data Retrieval Tool?

If you complete your tax returns prior to completing the [FAFSA](#), you might be able to use data retrieval to automatically populate information from your returns into your FAFSA. The IRS Data Retrieval tool helps streamline the FAFSA process by allowing online FAFSA filers to pull specific tax return data directly from the Internal Revenue Service. The tool is available in early February and is optional for use by FAFSA filers but is **strongly** encouraged by the U.S. Department of Education. Applicants may use the IRS Data Retrieval tool to populate tax information on the FAFSA within 1-2 weeks after filing taxes electronically and within 6-8 weeks after filing taxes by mail. You must have filed taxes, have a valid Social Security number and unchanged marital status to be eligible to use the tool.

Why should I utilize the IRS Data Retrieval Tool?

The IRS Data Retrieval ensures that accurate tax information is being submitted on the FAFSA. This helps to reduce errors, speed up the FAFSA process and allows you to receive your financial aid award sooner. If you utilize the IRS Data Retrieval option, Carroll will not require that you submit a tax transcript, even if you are selected for the Verification process. Please note that you might be asked to submit other documentation.

Who can use the IRS Data Retrieval Tool?

To utilize the IRS Data Retrieval option, you must have a federal tax return filed with the IRS, have a valid Social Security number, a Federal Aid Personal Identification Number (PIN) and have an unchanged marital status since December 31 of the previous year. Those students/parents who filed their taxes as "married, filing separately" are not eligible to use the IRS Data Retrieval Tool.

How do I utilize the IRS Data Retrieval Tool?

As you complete the FAFSA at www.fafsa.gov, when you come to the "Financial Information" section, if you have already completed your federal taxes, you will be asked if you wish to transfer your tax information using the IRS Data Retrieval Tool.

1. Enter your PIN* and click **Link to IRS**.
*You will not be asked to enter your PIN if you entered a PIN to begin your FAFSA.
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.
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 website. If you do not transfer your information or choose not to return from the IRS Web site, you will have to log in to open your saved FAFSA.
5. If you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS."