



How to Use the IRS Data Retrieval Tool

1. Log in to your 2016-2017 FAFSA at www.fafsa.ed.gov
 - If you have already submitted a 2016-2017 FAFSA, click on “Make FAFSA Corrections”.
 - If you have not yet submitted a 2016-2017 FAFSA, click on “Start 2016-2017 FAFSA” or “Continue”.
 - Ensure all information is complete and correct – continue until you get to the Financial Information section.
2. Transfer IRS data using the Data Retrieval Tool - Parent Information (if required) and Student Information

PARENT(S) (if required)	STUDENT
<ul style="list-style-type: none"> • Answer the questions to determine if the parent is eligible to use the data retrieval tool <ul style="list-style-type: none"> ○ Must be able to answer “Already Completed” ○ Parents who are married and filed as Married Filing Separately, are married and filed as Head of Household, filed a Form 1040X amended tax return, or filed a Puerto Rican or foreign tax return are not eligible to use the IRS Data Retrieval Tool • If eligible, select which parent is providing information on the FAFSA and enter that parent’s FSA ID username and password, then click “Link to IRS” <p style="margin-left: 20px;">Note: If you are not eligible to use the Data Retrieval Tool, you will need to order a 2015 Tax Return Transcript from the IRS – instructions are available at www.IRS.gov.</p> • Click “OK” to Leaving FAFSA on the Web • In the IRS.gov form, enter the parent’s information <ul style="list-style-type: none"> ○ Enter the parent’s address EXACTLY as it appears on the top of the 2015 tax return form and click “Submit”. • Data Retrieval is successful if the screen now shows a summary of the parent’s 2015 tax information. <p style="margin-left: 20px;">Note: If the screen shows a warning or other error, please review the FAQs for tips on how to resolve the error.</p> • Click the check-box and the “Transfer” button to transfer the information into the FAFSA • You will be taken back into your FAFSA – the words “Transferred from the IRS” will appear next to required fields such as Adjusted Gross Income and Taxes Paid. <ul style="list-style-type: none"> ○ DO NOT edit any transferred information. If any information is changed, Tax Return Transcripts will be required to complete verification of income. ○ Sign and submit your FAFSA <p style="margin-top: 10px;">Check your Financial Aid Portal 5 business days after you resubmit your FAFSA to ensure that we have received your corrections and there are no other required items.</p>	<ul style="list-style-type: none"> • Answer the questions to determine if the student is eligible to use the data retrieval tool <ul style="list-style-type: none"> ○ Must be able to answer “Already Completed” ○ Students who are married and filed as Married Filing Separately, are married and filed as Head of Household, filed a Form 1040X amended tax return, or filed a Puerto Rican or foreign tax return are not eligible to use the IRS Data Retrieval Tool • If eligible, click “Link to IRS” <p style="margin-left: 20px;">Note: If you are not eligible to use the Data Retrieval Tool, you will need to order a 2015 Tax Return Transcript from the IRS – instructions are available at www.IRS.gov.</p> • Click “OK” to Leaving FAFSA on the Web • In the IRS.gov form, some of the fields will be pre-filled – review that information and enter any missing information <ul style="list-style-type: none"> ○ Enter your address EXACTLY as it appears on the top of the 2015 tax return form and click “Submit”. • Data Retrieval is successful if the screen now shows a summary of your 2015 tax information. <p style="margin-left: 20px;">Note: If the screen shows a warning or other error, please review the FAQs for tips on how to resolve the error.</p> • Click the check-box and the “Transfer Now” button to transfer the information into the FAFSA • You will be taken back into your FAFSA – the words “Transferred from the IRS” will appear next to required fields such as Adjusted Gross Income and Taxes Paid. <ul style="list-style-type: none"> ○ DO NOT edit any transferred information. If any information is changed, Tax Return Transcripts will be required to complete verification of income. ○ Sign and submit your FAFSA <p style="margin-top: 10px;">Check your Financial Aid Portal 5 business days after you resubmit your FAFSA to ensure that we have received your corrections and there are no other required items.</p>

Frequently Asked Questions:

- 1. How long do I have to wait after I file my 2015 tax return to use the Data Retrieval Tool in my 2016-2017 FAFSA?**
 - If you filed electronically...
 - and had no amount owed to the IRS or had an expected refund or made full payment of an amount owed at the time that you filed, you should be able to use the data retrieval tool in 2-3 weeks after your tax return was accepted by the IRS.
 - and owed payment to the IRS and made full payment after filing your tax return, you should be able to use the data retrieval tool within 3-4 weeks after your payment was accepted by the IRS.
 - and owed payment to the IRS and have not yet paid, you should be able to use the data retrieval tool at the end of May 2016.
 - If you filed a paper form...
 - and had no amount owed to the IRS or had an expected refund, you should be able to use the data retrieval tool within 8-11 weeks after your tax return was accepted by the IRS.
 - and owed payment to the IRS, you should be able to use the data retrieval tool at the end of June 2016 (no matter when you made payment to the IRS).
- 2. Is there any other way to submit my tax information to complete the income requirement for my Verification?**
 - YES – Some people may find it easier to order a Tax Return Transcript from the IRS and submit a copy to our office. For instructions on how to request a transcript, please visit www.shoreline.edu/Financial-Aid.
- 3. Does it matter how I enter my address?**
 - YES - The IRS data retrieval tool is very sensitive to the information you enter for your address. You must enter your address EXACTLY as it is shown on your tax return form, or it will not recognize the information.
- 4. I moved since I filed my tax return, which address should I enter?**
 - The data retrieval tool will only recognize the address that the IRS has on file for you – this is most likely the address listed on your tax return.
- 5. I filed a joint tax return – does it matter whose information I enter?**
 - YES – You must enter the information for the parent who signs the FAFSA with their FSA ID username and password.
- 6. How many times can I attempt to use the data retrieval tool?**
 - After three failed attempts, the system will direct you back to your FAFSA to complete the form manually. If this happens to you, please refer to FAQ #1 above to ensure that your tax return has been processed by the IRS. If your return has not been processed, you must wait until it has been processed and try again. If your return has been processed, you may wait 2 days and try again, or you may order an IRS Tax Return Transcript instead.
- 7. I have had a change in marital status since December 31, 2015 – can I still use the data retrieval tool?**
 - NO – If you have gotten married, you must submit your 2015 tax return transcript and your spouse's 2015 tax return transcript. If you have gotten separated or divorced, but filed a joint return, you must submit your 2015 tax return transcript and copies of all your and your spouse's 2015 W-2s.

Still having trouble using the IRS data retrieval tool? Please contact our office!