IRS Data Retrieval Tool

The IRS Data Retrieval Tool (located on the FAFSA) allows students and parents to access the IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA), and transfer the data directly into their FAFSA from the IRS Web site.

If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using the tool for several reasons:

1. It's the easiest way to provide your tax data.

2. It's the best way of ensuring that your FAFSA has accurate tax information.

3. You won't need to provide a copy of your or your parents' tax return transcripts to KMBC if your FAFSA is selected for verification.

Am I eligible to use the IRS Data Retrieval Tool?

Most students and parents are eligible to use the IRS Data Retrieval Tool if they have already filed their taxes.

However, there are a few scenarios in which students and parents are ineligible to use the IRS Data Retrieval Tool, such as:

• The student or the student's parent is married and filed as Married Filing Separately.

• The student or the student's parent is married and filed as Head of Household.

• The parent's marital status is unmarried and both parents live together.

• The student or the student's parent filed an amended tax return.

• The student or the student's parent filed a Puerto Rican or foreign tax return.

Additionally, students or parents who filed their tax returns electronically within the last three weeks, or through the mail within the last 11 weeks, might need to enter their tax return information manually or return at a later date to transfer their tax return information into the FAFSA, as their tax return information might not be available for transfer from the IRS.

How do I use the IRS Data Retrieval Tool?

If you are eligible to use the 2018-2019 IRS Data Retrieval Tool, update the tax filing status of "Will File" to "Already Filed," then click **Link To IRS** to transfer your tax return information from the IRS Web site into your FAFSA. If the student's or the parent's tax filing status is showing as "Already Filed," continue by selecting the IRS Data Retrieval option and have income information transferred from the IRS to your FAFSA. A successful transfer/confirmation will allow us to forego the need to obtain a 2016 Tax Return Transcript if the FAFSA is selected for verification, so long as income data fields are not subsequently changed on the FAFSA. Please note that, in order for the IRS Data Retrieval Tool to work successfully, you must enter the primary tax filer's SSN, date of birth, and street address, so that it matches the address on the tax return. (This includes variations in spelling, upper/lower case and abbreviations.)

Use of the IRS Data Retrieval Tool is recommended because it avoids reporting errors and processing delays.

If you are ineligible or otherwise choose not to use the IRS Data Retrieval Tool to retrieve tax information, you will be required to submit a IRS Tax Return Transcripts if the FAFSA is selected for verification.

Why is the IRS Data Retrieval Tool not working?

If you are eligible to use the IRS Data Retrieval Tool but have tried unsuccessfully to use it, there could be several reasons why it is not working for you:

- The IRS Web site might be temporarily offline or experiencing some other technical issues.

- If you filed your taxes electronically within the last three weeks or via postal mail within the last 11 weeks, your tax information might not be available to be transferred into your FAFSA yet.

- The address you provided does not match the address you included on your most recent tax return. In order for the IRS Data Retrieval Tool to work successfully, you must enter your address information on the IRS Web site so that it matches exactly the address on your tax returns. (This includes variations in spelling and abbreviations.)

- Your federal tax return indicated a balance owed, which may result in a delay in processing.