IRS Data Retrieval Tool Information

The IRS Data Retrieval tool is an easy and secure way to access and transfer tax return information directly onto the FAFSA form, saving time and improving accuracy. Not everyone will be eligible to use the retrieval tool, but you should use it if you can, since it can simplify the process of applying for financial aid.

The U.S. Department of Education requires schools to verify the income information on some FAFSA applications. **Using the IRS Data Retrieval Tool and NOT CHANGING ANY DATA IMPORTED into your FAFSA** is one way to satisfy this verification requirement.

The steps to access your tax return information via the IRS Data Retrieval Tool are built into the online FAFSA application at www.fafsa.gov. You can access the tool when completing the initial FAFSA or later, if you will be filing your federal taxes after you submit your FAFSA.

Who can use the IRS Data Retrieval Tool?
Taxpayers who wish to use the tool must:

- Have filed a federal tax return for the year being requested on the FAFSA;
- Possess a valid Social Security Number;
- Have a Federal Student Aid PIN (if you don’t have a PIN, you will be given the option to apply for one through the FAFSA application process);
- Have not changed marital status since December 31st of the tax year being requested.

Why wouldn’t I be eligible to use the IRS Data Retrieval Tool?
If any of the following conditions apply to the student or parent(s), the IRS Data Retrieval Tool may not be used for the tax year being requested:

- You filed taxes as “Married Filing Separately”;
- You are married and you filed taxes as “Head of Household”;
- You filed an amended tax return;
- You filed an electronic tax return less than two weeks before trying to use the tool;
- You filed a paper tax return less than six weeks before trying to use the tool;
- Your address on the FAFSA is different from the address on your tax return;
- Your marital status has changed since December 31st of the tax year being requested;
- You filed a Puerto Rico or foreign tax return.

I don’t qualify to use the IRS Data Retrieval Tool, but the financial aid office is requesting my federal tax return information. What can I do?

- If the IRS Data Retrieval Tool cannot be used and if the financial aid office requests verification documentation, you may request an official **Tax Return Transcript** from the IRS.
- To order a Tax Return Transcript, visit [www.irs.gov](http://www.irs.gov) and select “Order a Transcript” or call the Transcript toll-free line at 1-800-908-9946.

(continued on next page)
I am starting a new FAFSA. How do I access the IRS Data Retrieval Tool?

- Go to www.fafsa.gov and follow the steps to begin the application. Fill in all information, verifying accuracy of the information.
- At the Financial Information section (for student and parent, if applicable), you will see the question, “For (tax year), have you completed your IRS income tax return or another tax return?”
- Answer the eligibility questions and, if eligible, the “Link to IRS Information” will appear; enter the appropriate FAFSA PIN and click “Link to IRS.”
- Pop-up windows will notify you that you are leaving the FAFSA site.
- Once you have accessed the IRS website, your tax information will appear and you will need to fill in the tax filing status and address information as found on that year’s federal tax return.
- If successful, data from your tax form will be brought back to the FAFSA website and you’ll be prompted to enter wage information.
- **DO NOT MAKE CHANGES to any data that is populated from the IRS,** as this will cause the financial aid office to request a Tax Return Transcript to verify the tax information. If anything seems incorrect, contact the financial aid office.
- Continue completing the FAFSA and sign it using the student (and parent, if applicable) PIN.
- When you have completed the application, be sure to “Submit” it so the financial aid office will receive your application.

I need to complete the FAFSA as early as possible, but haven’t submitted my tax return yet. What should I do?

You can submit the FAFSA with estimated information and then use the IRS Data Retrieval Tool to “correct” the information on the FAFSA you submitted previously. To make a correction:

- Go to www.fafsa.gov and login.
- Select the FAFSA year you are applying for, and click “Make FAFSA Corrections.” Once you enter the student’s PIN and password, the original FAFSA information will be displayed.
- Scroll through the information using the “Next” button until you reach the Financial Information section (for student and parent, if applicable), where you will see the question, “For [tax year], have you completed your IRS income tax return or another tax return?”
- Answer the eligibility questions and, if you are eligible, the “Link to IRS Information” will appear; enter the appropriate FAFSA PIN (student or parent) and click “Link to IRS.” Pop-up windows will notify you that you are leaving the FAFSA site.
- Once you have accessed the IRS website, your tax information will appear and you will need to fill in the tax filing status and address information as found on that year’s federal tax return.
- If successful, data from your tax form will be brought back to the FAFSA website and you’ll be prompted to enter wage information.
- **DO NOT MAKE CHANGES to any data that is populated from the IRS,** as this will cause the financial aid office to request a Tax Return Transcript to verify the tax information. If anything seems incorrect, contact the financial aid office.
- Don’t forget to **SUBMIT your corrections** so the financial aid office will receive the updated information.

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