

IRS Data Retrieval Tool Available as of February 3, 2013 **For the 2013-2014 Academic Year**

The **IRS Data Retrieval Tool** is a step in the FAFSA process and is accessible through the FAFSA website www.fafsa.gov. It allows FAFSA applicants and parents to transfer their federal income tax information from the IRS to the FAFSA, ensuring that the most accurate information is used to determine financial aid eligibility.

For the 2013-2014 award year, FAFSA applicants (and parents of dependent applicants) will receive email communication from the Department of Education directing them to use the IRS Data Retrieval Tool to update their income information on the FAFSA once they have filed their federal income tax return. Applicants selected for the verification process will be required to use the IRS Data Retrieval Tool, or they may choose to request a tax transcript from the IRS, which should be submitted to the Financial Aid Office.

WHEN WILL DATA BE AVAILABLE FROM THE IRS?

Electronic Tax Filers (refunds or no payment due)	Data will be available within 2 - 3 weeks of filing
Electronic Tax Filers (tax payment due)	Data will be available within 6 - 7 weeks of filing
All Paper Tax Filers	Data will be available within 8-11 weeks of filing

If you plan to submit your FAFSA before you and/or your parents complete and submit your 2012 Federal Tax Return, be sure to use the IRS Data Retrieval Tool to update your FAFSA record once the returns have been submitted and the income data is available to be retrieved.

WHO IS "NOT" ELIGIBLE TO USE THE TOOL?

- Applicants whose marital status has changed as of January 1, 2013.
- Applicants who are not required to file a 2012 Federal Tax Return.
- Married couples who file separate tax returns.
- Applicants and/or parents of dependent students who file as Head of Household.
- Applicants and/or parents of dependent students who file foreign tax returns.
- Applicants and/or parents of dependent students who have filed amended tax returns.

HOW DO YOU USE THE IRS DATA RETRIEVAL TOOL?

- Log onto your FAFSA at www.fafsa.gov
- Select "Make Corrections"
- Click on "Financial Information" tab at the top
- Check that it indicates your taxes are "Already Completed"
- Click on the IRS Data Retrieval Tool link
- Fill in your filing status and address used to file the taxes
- Review your tax information to transfer to your FAFSA
- Check the box "Transfer My Tax Information into the FAFSA"
- Click "Transfer Now"
- Submit your FAFSA

(See Reverse Side for Additional Information)

SPECIAL ITEM OF NOTE - Applicants who change the IRS income information on the FAFSA Applicants who use the tool but subsequently change the income information will be informed they must explain to their institutions why information they provided is more accurate than the information available through the IRS. Contact the Financial Aid Office at 1-800-835-7780 or fao@allegheny.edu to discuss your circumstances. The Financial Aid administrator will ask you to submit documentation such as copies of your W-2 form, last paycheck stub, a letter from your employer, tax transcript, or other verification paperwork.

Screen shot of the IRS Data Retrieval Tool:

The screenshot shows the IRS.gov interface for the "Parent <YYYY> Federal Income Tax Information" tool. At the top, there is a navigation bar with the IRS logo and links for "Return to FAFSA", "Log Out", and "Help". Below the header, the page title is "Parent <YYYY> Federal Income Tax Information". A sub-header states: "The information below is your tax information that will help you answer some of the questions on the FAFSA."

	My Tax Information	FAFSA Question Numbers
Tax Year	<2008>	
Name (s)	<Joe & Jane Smith>	
Social Security Number	<***-**-6789>	
Filing Status	<Married-Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question <###> on the FAFSA
Adjusted Gross Income	<\$126,721>	Question <###> on the FAFSA
Income Tax	<\$31,400>	Question <###> on the FAFSA
IRS Exemptions	<5>	Question <###> on the FAFSA
Education Credits	<\$2,500>	Question <###> on the FAFSA
IRA Deductions and Payments	<\$2,500>	Question <###> on the FAFSA
Tax-Exempt Interest Income	<\$2,500>	Question <###> on the FAFSA
Untaxed IRA Distributions	<-\$2,500>	Question <###> on the FAFSA
Untaxed Pensions	<-\$2,500>	Question <###> on the FAFSA

Below the table, there is a "Print this page for your records before choosing an option below." link. Two main options are presented in a bordered box:

- Transfer My Tax Information into the FAFSA**: Includes a "Transfer Now" button and a checkbox with the text: "The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information."
- Do Not Transfer My Tax Information and Return to the FAFSA**: Includes a "Do Not Transfer" button and a checkbox with the text: "By clicking the 'Do Not Transfer' button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA."

(See Reverse Side for Additional Information)