

**Pepperdine University, Seaver College**  
**Office of Financial Assistance**  
**IRS Data Retrieval Tool Q&A**

**What is the IRS Data Retrieval Tool?**

The IRS Data Retrieval Tool allows students and parents to access their IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA). Students and parents may transfer the data directly into their FAFSA. The "IRS Data Retrieval" process for the 2012-2013 academic year is tentatively scheduled to be available *starting February 1, 2012*.

- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after the return has been filed.
- Data from paper tax returns will be available in 6-8 weeks.

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 request an [IRS Tax Transcript](#) for you or your parents' tax returns.

If you do not use the IRS Data Retrieval Tool to provide tax information or if you are not eligible to use it, you may be required to obtain an official tax transcript from the IRS.

**How does the student IRS Data Retrieval Tool work?**

1. From your FAFSA - 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.

Your FAFSA will be saved and you will be transferred to the IRS Web site.

On the IRS Web site, enter the requested information.

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 Web site. If you do not transfer your information or choose not to return from the IRS Web site, you will have to login to open your saved FAFSA.

If you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS."

**How does the parent IRS Data Retrieval Tool work?**

1. From your FAFSA - Enter your PIN and click **Link To IRS**
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 Web site. If you do not transfer your information or choose not to return from the IRS Web site, you will have to login 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."

## **Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.?**

If you did not file a Federal IRS tax return, you cannot use the IRS Data Retrieval Tool because there is no information on file with the IRS for you to view and transfer.

If you filed both a Federal IRS tax return and a Puerto Rican or foreign tax return, you will only be able to view and transfer your Federal IRS tax return information if you link to the IRS Web site. Therefore, your IRS tax return information may not completely reflect what you need to report on the FAFSA.

**Under certain conditions, parents are not eligible to use the IRS Data Retrieval Tool**, which allows users to link to the IRS Web site and securely transfer IRS tax return information into their FAFSA. If you meet any of the conditions below, you will not be presented with the option to link to the IRS.

**You, the parents, filed as Married Filing Separately** if you are married, but you and your spouse filed separate tax returns.

**You, the parents, filed as Head of Household** if you are married, but you or your spouse filed as head of household.

**You, the parents, filed an amended tax return** if you filed an amended tax return.

**You, the parents, filed a Puerto Rican or foreign tax return** if you filed a tax return in Puerto Rico or a foreign country.

**You, the parents, recently filed taxes** if you filed taxes electronically within the last two weeks, or by mail within the last eight weeks.