FAFSA -- I.R.S. Data Retrieval Process

Overview

Officials in the Office of Federal Student Aid and the Internal Revenue Service have worked together to develop a process to simplify the steps that families must take each year to complete the Free Application for Federal Student Aid (“FAFSA”).

Federal Student Aid staff have redesigned the “FAFSA on the Web” site to simplify the application process for applicants.

How This Will Work on the 2012-2013 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.

All 2012-2013 FAFSA On The Web applicants, and the parents of dependent applicants, who indicate that they have filed their federal tax returns prior to completing their FAFSA and who are otherwise eligible will be directed to use the FAFSA-IRS Data Retrieval process to complete their FAFSA more easily and accurately.

Applicants who chose not to use the FAFSA-IRS Data Retrieval process, or who retrieve IRS data but subsequently change it, will be informed that they will need to explain to their institutions why information they provided is more accurate than the information that would have been obtained directly from the IRS. They will need to provide information obtained directly from the IRS.
In general, all applicants who have already filed but elect to not use the retrieval process will be subject to being selected for verification based upon the risk they pose to federal funds and, if they are selected, will be required to support their reported FAFSA data with information obtained directly from the IRS.

Families **must actively choose** to utilize the data retrieval tool. If they choose to do so, they will be transferred to the Internal Revenue Service web site.
Applicants will need to authenticate their identity before any personal information is displayed.
Tax data will be presented and the applicant will have the option to “Transfer” the tax information to the FAFSA. Applicants can also choose NOT to transfer the data to the FAFSA.

Transferred data will have a notation - “Transferred from the IRS”

Remember,

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**Some Families Will Not Be Able to Use This Tool**

- A married independent applicant and spouse who filed separate tax returns;
- When the parents of a dependent student filed separate tax returns.
- An applicant or applicant’s parent who have had a change in marital status after the end of the tax year on December 31, 2011.
- The applicant, or parent or spouse, as applicable, who has filed an amended tax return, will not be able to use the “DRT”.

These families should contact the financial aid office at 785-309-3106 or via email at susan.eberwein@salinotech.edu for more information.