FAFSA - IRS Data Retrieval Instructions

The Department of Education has provided what is called the IRS Data Retrieval Option on the FAFSA as a way of allowing tax filers to pull their tax data directly from the IRS (once a tax return has been processed) and transfer it to the FAFSA. This process ensures easier, quicker, and more accurate processing. However, there are some important details to pay attention to so that everything goes smoothly. Unfortunately, there are certain categories of tax filers (see following) who are ineligible to complete the data retrieval; they will need to request a tax return transcript instead.

Eligibility
There are a few situations in which a tax filer is **ineligible** to use the IRS Data Retrieval Process and will need to submit an IRS "Tax Return Transcript" instead (see separate instructions):

1) Filing "Married filing separately" – You must submit a transcript for each spouse.
2) Filing an amended return. Contact our office for instructions.
3) Filing a Puerto Rican or foreign tax return. Contact our office for instructions.
4) Had a recent change in marital status. Contact our office for instructions.

Special situations
1) Rollovers: If a parent completed a retirement account rollover, please contact our office for instructions.
2) Tax-filing extension: If a parent filed for and was granted a tax-filing extension, please contact our office for instructions.

How to complete the IRS Data Retrieval
Please use the following steps to complete the IRS Data Retrieval process. See also **Troubleshooting** (following).

1) Log into your FAFSA at www.fafsa.gov.
2) Returning to the FAFSA to complete the data retrieval after having completed an initial FAFSA? Click on "Make FAFSA Corrections."
3) Click the "School Selection" tab. Ensure that Wheaton College in **Illinois** is a Selected School. Our Federal School Code is 001781.
4) Click on the "Financial Information" tab. You will need to do steps 5-9 separately for student and parent.
5) Change "Will File" to "Already Completed" if you have already completed your taxes. If you have not, stop here. You will need to wait until the IRS has processed your return to use IRS Data Retrieval.
6) If you are eligible to use the IRS Data Retrieval Process, click on "Link to IRS" link and click "OK."
7) On the IRS Web site, enter the requested information and click submit. Note your address must be entered **exactly** as it appears on your tax return.
8) Click on "Transfer My Tax Information into the FAFSA" and then click "Transfer Now."
9) You should see a message saying, "You have successfully transferred your 2015 tax information." You should later see questions that are filled in with tax information marked with "Transferred from the IRS." **Do NOT change the data once it has transferred, or we will not be able to download and use the results.**
10) Be sure to finish going through all the steps and electronically sign (if you are a dependent student, one of your parents also needs to electronically sign) and **submit** your FAFSA. **You are not finished until you have successfully submitted your FAFSA and received a confirmation number.**

Troubleshooting if IRS Data Retrieval does not work
Here are a few other common causes of problems:

1. **Problem: You try to do the data retrieval, but you get a message saying you are not "eligible".**
    Reason: This is not the same as being in an ineligible tax filing category (such as filing an amended return). This message usually indicates that the IRS cannot access your information, possibly because the IRS has not yet processed your return. It generally takes at least 2 weeks after e-filing and 8 weeks after paper filing for the IRS to process your return. These time frames may be longer if you owed taxes when you filed your return or you filed close to April 15th.
    Solution: Try again in a few weeks.

2. **Problem: The FAFSA won't let you submit your correction.**
    Reason: It could be because your tax information on the FAFSA is identical to what is on the data retrieval.
    Solution: To make the FAFSA recognize the data retrieval as a correction, you can "trick" it by making a minor change to your address on the FAFSA (but **not** on the Data Retrieval Tool) to signal that something needs to be corrected. An example is abbreviating "Street" to "St." or vice versa.

3. **Problem: You try to link to the IRS data, but after you input your name and address, you get a message telling you that they have no record of your account.**
    Reason: It could be that the address you are entering does not match the address on your income tax return or that you, the student, did not actually file an income tax return.
    Solutions: a. Make sure the information you enter is **exactly** the same as the information on your tax return. Occasionally—especially for those with addresses that are not standard U.S. addresses—a tax filer has needed to request a tax return transcript instead of doing the IRS Data Retrieval.
    b. Also, especially for students, make sure you really did file a federal tax return. If a tax filer has filed a state return but NOT a federal return, there is no need to complete the IRS Data Retrieval.