Tips and Tricks for Completing the IRS Data Retrieval Tool

**Step 1:** The data retrieval tool (DRT) will only be available to individuals who have filed a tax return at least two weeks prior to filling out the FAFSA application. If you are selecting “Will File” it would be to your benefit to wait until after you file taxes to complete the FAFSA.

**Step 2:** It is of great importance that you attempt to fill out all of the information on the next screen with your 2012 tax return in front of you (from your tax preparer or self-filed—you do not need a tax transcript at this time).

You may attempt a DRT transfer three times in a row, but after that, each individual time you attempt to transfer, it will automatically take you back to the FAFSA page. If you wish to continue attempting you will have to hit the “Previous” button, put in your PIN#, and navigate to the IRS page after every unsuccessful attempt.

Here are just a few reasons this is so crucial:

- If a tax preparer filed your return for you, the individual typing the return could have misspelled or mistyped any of the items they are asking for below. In which case, you would never be able to link the information as it would be incorrect in the IRS’s system.
  - Example: Your last name = Gonzalez, tax preparer typed Gonzales (they will not match!)
- You may have moved once or several times in the last year and cannot remember the exact address you were at when you filed your 2012 tax return.

If you need to retrieve your PIN by answering the secret question please remember the password is **CASE SENSITIVE** and will not show you the secret answer as you type it! You are only allowed 3 attempts. If your answer, for example, is “Milwaukee” and that does not work, you may want to try “milwaukee” with all lower case.
• The tax preparer may have put an apartment number on the “Street Address” line or in the “Apt. Number” line below.

• You may have gotten married in 2012 and aren’t sure if you filed with your married last name or your maiden/former last name.

**Step 3:** The following are the different fields that could have wrong information:

1. Make sure your name appears as it does on your tax return. **If you do not have your tax return in front of you** make sure the FAFSA transferred your name from the demographic information on the first page correctly and that you did not type anything in error (i.e. JENNIFR instead of JENNIFER) and if your name has any type of punctuation in it you may want to try without punctuation if the match does not work the first time and all other information is correct.

   • Example: LA’RONDA or SMITH-DOE

2. Make sure your date of birth appears as it does on your tax return. The FAFSA will automatically transfer your date of birth from earlier in the application when you filled it out in the demographic information. It is of course possible that
you miss-typed this information earlier on your application, so do a double check here, and, if incorrect, you can correct it here then go back to your demographic information.

Make sure you select the filing status that is indicated on your tax return. If you do not have your tax return in front of you and you are not 100% sure what status you filed remember that this may be the field you need to change if the information does not match.

1. Example: You are not sure if you filed “Single” or “Head of Household” – attempt the one you feel more strongly it may be, then next time you try ONLY change the filing status, do not change any other information or you will not narrow down where the error is.

The address portion is BY FAR the area which is most likely to have the error if your information does not match. Here, especially, is where it is crucial to have your tax return in front of you. Also, using all capital letters is usually the best option for this section in particular as the returns are often entered in all caps.

Here are a few things to be aware of with the address section if you do not have your tax return in front of you:

1. To begin, abbreviations for roads must match exactly.
   - ADDRESS AS IT APPEARS ON THE RETURN: 1234 N CHERRY TREE LN
     - The following addresses will not work if typed as the following:
       - 1234 NORTH CHERRY TREE LANE
       - 1234 N. CHERRY TREE LN.
       - Any other combination of the two lines above

2. The other issue that can arise with the address portion is if you have an apartment number, the tax preparer may have put the apartment number/letter on the “Street Address” line or the “Apt. Number” line.
   - Also, if the tax preparer put the apartment number on the “Street Address” line, you also need to add that exactly at the end, for example:
     - ADDRESS AS IT APPEARS ON THE RETURN: 1234 N CHERRY TREE LN APT 3
       - The following addresses will not work:
         - 1234 N CHERRY TREE LN APT. 3
         - 1234 N CHERRY TREE LN #3

3. If you added a P.O. Box number along with your street address, type that information into the appropriate box as it appears on your tax return. If you do not have your tax return in front of you, you may wish to add a P.O. Box number to your street address if you have one as that may be what you indicated on your tax return. (Remember to only change one thing at a time!)
Step 4: The following is a sample of how information is copied from a tax return to the DRT:

Get My Federal Income Tax Information

See our Privacy Notice regarding our request for your personal information.

Enter the following information as it appears on your 2011 Federal Income Tax Return.

First Name * 
RACHEL

Last Name * 
JOHNSON SMITH

Social Security Number * 
*** - ** - 6453

Date of Birth * 
01 / 01 / 1980

Filing Status * 
Head of Household


Street Address * 
5678 N 32ND AVE

P.O. Box (Required if entered on your tax return) 

Apt Number (Required if entered on your tax return) 
201

Country * 
United States

City, Town or Post Office * 
MILWAUKEE

State/U.S. Territory * 
Wisconsin (WI)

ZIP Code * 
53212

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

Return to FAFSA  Log Out  Help

IRS Privacy Policy