

## 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.

The screenshot shows the 'Student Tax Information' section of a FAFSA application. At the top, a green box with a checkmark icon says 'Application was successfully saved.' Below this, a question asks 'For 2011, have you completed your IRS income tax return or another tax return?' with a dropdown menu set to 'Already completed'. A blue box contains a warning: 'You may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS. Check all that apply or check None of the above.' There are four checkboxes: 'I filed an amended tax return', 'I filed a Puerto Rican or foreign tax return', 'I recently filed my taxes', and 'None of the above'. A red arrow points to the 'I recently filed my taxes' checkbox, and a text box next to it says 'DO NOT select that you recently filed your taxes if you filed 2 weeks from the day you are filling your FAFSA out or prior.' Below this, a section titled 'Based on your response, we recommend that you transfer your information from the IRS into this FAFSA.' asks for a PIN and has a 'LINK TO IRS' button. A red arrow points to the 'LINK TO IRS' button, and a text box next to it says '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.' At the bottom, there are 'PREVIOUS' and 'NEXT' buttons.

**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.

- 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.

The screenshot shows the IRS website interface for retrieving tax information. At the top, there are links for 'Return to FAFSA', 'Log Out', 'Help', and 'Español'. The main heading is 'Get My Federal Income Tax Information'. Below this, there is a privacy notice and a prompt to enter information from the 2011 Federal Income Tax Return. The form contains several fields, with four orange circles highlighting specific areas: 1. The 'First Name' field containing 'JANE'. 2. The 'Date of Birth' field, which is empty. 3. The 'Filing Status' dropdown menu, currently set to 'Select One'. 4. The 'Apt. Number' field, which is empty. Other fields include 'Last Name' (DOE), 'Social Security Number' (\*\*\* - \*\* - 64 0000), 'Street Address', 'P.O. Box', 'Country' (United States), 'City, Town or Post Office', 'State/U.S. Territory' (Select One), and 'ZIP Code'. At the bottom, there are 'Return to FAFSA' and 'Submit' buttons, and a link to the 'IRS Privacy Policy'.

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

- 1 Make sure that 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.

3

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.

4

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:

Form <b>1040</b> Department of the Treasury—Internal Revenue Service (99)		<b>2011</b>	OMB No. 1545-0074	IRS Use Only—Do not write or staple in this space.
For the year Jan. 1–Dec. 31, 2011, or other tax year beginning		, 2011, ending	, 20	See separate instructions.
Your first name and initial <b>RACHEL M.</b>	Last name <b>JOHNSON SMITH</b>		Your social security number <b>01213415678</b>	
If a joint return, spouse's first name and initial	Last name		Spouse's social security number	
Home address (number and street). If you have a P.O. box, see instructions. <b>5678 N 32ND AVE</b>			Apt. no. <b>201</b>	▲ Make sure the SSN(s) above and on line 8c are correct.
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). <b>MILWAUKEE, WI, 53212</b>			Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse	
Foreign country name		Foreign province/county	Foreign postal code	
<b>Filing Status</b>	1 <input type="checkbox"/> Single	4 <input checked="" type="checkbox"/> Head of household (with qualifying person). (See instructions.) if the qualifying person is a child but not your dependent, enter this child's name here. ▶		5 <input type="checkbox"/> Qualifying widow(er) with dependent child
Check only one box.	2 <input type="checkbox"/> Married filing jointly (even if only one had income)	3 <input type="checkbox"/> Married filing separately. Enter spouse's SSN above and full name here. ▶		



[Return to FAFSA](#) | [Log Out](#) | [Help](#)

[Español](#)

## 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. ?

Required fields \*

First Name *	RACHEL
Last Name *	JOHNSON SMITH
Social Security Number *	*** - ** - 6453
Date of Birth *	01 / 01 / 1980
Filing Status * ?	Head of Household ▼
Address - Must match your 2011 Federal Income Tax Return. ?	
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](#)

[Submit](#)