The U.S. Department of Education and the Internal Revenue Service (IRS) have worked together to develop the IRS Data Retrieval tool to simplify the steps that families must take each year to complete the Free Application for Federal Student Aid (FAFSA). This tool allows students and their families to transfer information from their Federal Tax Return directly to the FAFSA. The IRS Data Retrieval tool is the easiest way to provide your tax data, the best way of ensuring that your FAFSA has accurate tax return information, and will reduce the amount of paperwork you will have to submit to Winthrop University.

The IRS Data Retrieval is available approximately 1-2 weeks after electronically filing a federal tax return or approximately 6-8 weeks after filing a federal tax return by mail.

Students and parents in the following situations will not be able to use the IRS Data Retrieval:

- A student or parent who indicates they have not already filed a tax return or will not file a tax return
- A married, independent student and spouse who filed separate tax returns
- Married parents who filed separate tax returns
- A student or parent who has had a change in marital status after December 31, 2011
- A student, spouse, or parent who has filed an amended tax return

If you or your parent are not eligible to use the IRS Data Retrieval tool, you will be required to submit a copy of a Federal IRS Tax Return Transcript. Please refer to the IRS Tax Return Transcript Process directions located on the Forms page of the Office of Financial Aid Web site (www.winthrop.edu/finaid).

If you or your parent filed an amended 2011 Federal IRS Tax Return you must also submit a copy of your Federal Tax Account Transcript.

If you or your parent decide not to use the IRS Data Retrieval tool, you will be required to submit a copy of your 2011 Federal IRS Tax Return Transcript as part of the verification process. Please refer to the IRS Tax Return Transcript Process directions located on the Forms page of the Office of Financial Aid Web site (www.winthrop.edu/finaid).

Using the IRS Data Retrieval while submitting your initial FAFSA

- In the “Financial Information” section of the FAFSA choose the IRS Data Retrieval tool.
- Enter your FAFSA PIN and choose “Link to IRS”
- Your FAFSA will be saved and you will be transferred to the IRS Web site.
- On the IRS Web site, enter the requested information and click submit.
  - Note – the address you enter must match your tax return exactly
- Choose “Transfer My Tax Information into the FAFSA”
- Click “Transfer Now”
- When returned to the FAFSA Web site, enter your wages on the “how much did you earn from working…” question
  - If applicable, also enter “how much did your spouse earn from working…” question
- Proceed to next question and follow the directions
Using the IRS Data Retrieval by correcting your FAFSA

- Log in to your FAFSA at www.fafsa.ed.gov
- Click “Make FAFSA Corrections” and enter your PIN and create a password
- Click the “Financial Information” tab
- Confirm that the filing status (first question) says “Already Completed”
  - If you are able to answer “None of the above” to the tax filing questions the “Link To IRS” button will appear
- Click “Link to IRS” and then click “OK”
- On the IRS Web site, enter the requested information and click submit.
  - Note – the address you enter must match your tax return exactly
- Choose “Transfer My Tax Information into the FAFSA”
- Click “Transfer Now”
- When returned to the FAFSA Web site, enter your wages on the “how much did you earn from working…” question
  - If applicable, also enter “how much did your spouse earn from working…” question
- Click “Sign & Submit” tab and choose “Next”
- Enter all required fields and press “SUBMIT MY FAFSA NOW”

Using the IRS Data Retrieval for parents’ tax information by correcting your FAFSA

- Have your parent log in to your FAFSA at www.fafsa.ed.gov
- Click “Make FAFSA Corrections” and enter your (parent) PIN and create a password
- Click the “Financial Information” tab
- Under Parent Financial Information, confirm that the filing status (first question) says “Already Completed”
  - If your parent is able to answer “None of the above” to the tax filing questions the “Link To IRS” button will appear
- Select your identity (mother or father) and enter your (parent) PIN
- Click “Link to IRS”
- On the IRS Web site, enter the requested information and click submit.
  - Note – the address your parent enters must match his/her tax return exactly
- Choose “Transfer My Tax Information into the FAFSA”
- Click “Transfer Now”
- When returned to the FAFSA Web site, enter your (parent) wages on the “how much did your father earn from working…” and “how much did your mother earn from working…” questions (if applicable)
- Click “Sign & Submit” tab and choose “Next”
- Enter all required fields and press “SUBMIT MY FAFSA NOW”

For assistance in using the IRS Data Retrieval, please contact The Federal Student Aid Information Center at 1-800-433-3243 or click the “live help” online at www.fafsa.ed.gov. Contact the Office of Financial Aid with any additional questions.