

It is always best to use the IRS Data Retrieval Tool in the FAFSA application.

This will make completing the financial information in the FAFSA as easy and accurate as possible. Successfully using the tool helps verify that the numbers are accurate and come directly from the IRS records. If a student files taxes and also provides parent financial information, then both the student and parent(s) should use the IRS Data Retrieval Tool.

Who can use the Data Retrieval Tool

The DRT should be available for almost all students and parents.

The FAFSA uses “Prior Prior” year information. (i.e. 2019 for 2021-2022; 2018 for 2020-2021)

However, there are a few scenarios in which students or parents are ineligible to use the IRS Data Retrieval Tool:

- Married, but did not file with current spouse as Married Filing Jointly.
- The parents’ marital status is “Unmarried and both parents living together.”
- The student/parent filed a Puerto Rican or foreign tax return.

Any students or parents who meet the above criteria will need to enter their tax return information manually. If chosen for verification, then tax documents will need to be submitted to the Financial Aid Office. See additional information on what documents can be submitted [on our forms page](#), or e-mail for further instructions. (finaid@goucher.edu)

How to use the Data Retrieval Tool

1. If you have already submitted a FAFSA without using the tool, then [log back in to your FAFSA](#) and choose the option to make a FAFSA correction.
2. In the Financial Information sections, answer the first yes/no questions about how and when taxes were filed. If you are eligible, you will be presented with a button to use the IRS Data Retrieval Tool.
3. Use the button to link to the IRS web page, and confirm your identity there. **Your information needs to exactly match the IRS records.**
4. **MOST IMPORTANT STEP:** After your information comes up at the IRS web page, **please make sure you choose the appropriate options to transfer the information back into the FAFSA application.** Usually, you need to check a box and a “Transfer Now” button.
5. If the student also filed, you will need to do steps 2-4 for both the student and parent(s) as needed.
6. **REMEMBER TO SUBMIT THE FAFSA** (Sign & Submit tab) after transferring the information!

You’re done! Please allow 5 business days for the FAFSA to be processed. Current returning students may check their “Documents” screen in [Net Partner](#) about a week after submitting or e-mail us for confirmation.

What if it doesn’t work?

If the IRS system can’t retrieve your information, then please make sure there are no errors or mismatches in how you keyed in your personal information. **Your information needs to exactly match your tax form, including the address.** You may also not be able to use the tool if you currently owe any back taxes.

If you require additional assistance, please contact us at 410-337-6141, or finaid@goucher.edu.