CONCORDIA UNIVERSITY
WISCONSIN & ANN ARBOR

Using the DATA RETRIEVAL TOOL on the FAFSA Form

To use this tool, you must have already submitted your taxes to the IRS and they need to have already processed them.

(The processing time is about 2 weeks for electronic filing and 6 weeks for mail-in filing.)

When filling out the FAFSA Initially:

Fill out the FAFSA as normal.

Once you reach the Financial Information section, the below instructions can be used for both parent and student (if they filed).

1. It will ask:

   a. "For 2019, have you completed your IRS income tax return or another tax return?"

      i. Select – **ALREADY COMPLETED**

   b. Did you file a Puerto Rican or foreign tax return for 2019?

      i. If yes, you will need to enter tax information manually.

      ii. If no, you will be given the option to continue with the Data Retrieval Tool.

2. FAFSA will present an option for the IRS Data Retrieval Tool.

   a. Click on '**LINK TO IRS**'

   b. The next screen explains the IRS Data Retrieval Tool. Click '**LINK TO IRS**' a second time.

3. The tax-filer will be redirected to the IRS Government Website.

   a. Fill out the personal information requested as presented on your 2019 Federal Income Tax Return.

   b. Click '**Submit**'

   c. It will take you to a second page with tax information. At the bottom, click '**Transfer my tax information into the FAFSA**', and then click '**Transfer Now**'.

4. Your tax information is now being directly transferred onto your FAFSA.

   a. Please keep in mind that due to high-security measures in place, the tax-filer will be unable to view the tax information transferred.

When logging back onto an already completed FAFSA:

It will ask you for your identifying information as well as ask you to create a temporary username, and password. (This is not something already completed and you can make it up on the spot)

1. Click on the Financial Information section at the top of the form.
2. You then will complete steps 1-4 as listed in the section above.