2015-2016 FAFSA
IRS Data Retrieval Process

Officials in the Office of Federal Student Aid and the Internal Revenue Service have worked together to develop a process to simplify the steps that families must take each year to complete the Free Application for Federal Student Aid ("FAFSA"). Federal Student Aid staff has redesigned the "FAFSA on the Web" site to simplify the application process for applicants.

The benefit (to families) of utilizing the IRS Data Retrieval Process is that it will greatly simplify and expedite the verification process. You will no longer have to submit complete copies of your federal tax returns to our office before we can finalize your federal aid eligibility.

The "IRS Data Retrieval" process for the 2015-2016 academic year is scheduled to be available starting February 1, 2015.

- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after the return has been filed,
- Data from paper tax returns will be available in 6-8 weeks.

All 2015-2016 FAFSA On The Web applicants, and the parents of dependent applicants, who indicate that they have filed their federal tax returns prior to completing their FAFSA and who are otherwise eligible will be directed to use the FAFSA-IRS Data Retrieval process to complete their FAFSA more easily and accurately.

Applicants who chose not to use the FAFSA-IRS Data Retrieval process, or who retrieve IRS data but subsequently change it, will be informed that they will need to explain to their institutions why information they provided is more accurate than the information that would have been obtained directly from the IRS. They will need to provide information obtained directly from the IRS.
Families must actively choose to utilize the data retrieval tool. If they choose to do so, they will be transferred to the Internal Revenue Service web site.
Applicants will need to authenticate their identity before any personal information is displayed.

Tax data will be presented and the applicant will have the option to “Transfer” the tax information to the FAFSA. Applicants can also choose NOT to transfer the data to the FAFSA. Transferred data will have a notation - “Transferred from the IRS”.

Alvernia University  ●  Office of Student Financial Planning  ●  Phone-(610) 796-8356  ●  Fax-(610) 796-8336
FAFSA Corrections

We know that many students/parents will not have their federal tax returns completed by the priority application deadline of February 15, 2015. These families can use "estimated income" information on the initial FAFSA. These families will be able to use this process once their tax returns are completed.

Using emails and other communications, starting around April 1, 2015, Federal Student Aid will remind applicants that once they have filed their income tax return they should use the FAFSA corrections process to update their FAFSA using the FAFSA-IRS Data Retrieval process. Subsequent messages will be sent every 45 days until mid-September then every 60 days until the end of the processing cycle.

- Click on the link in the middle of the page "Make FAFSA Corrections"

When the IRS Data Retrieval Tool cannot be used:

- A married independent applicant and spouse who filed separate tax returns;
- When the parents of a dependent student filed separate tax returns.
- An applicant or applicant’s parent who have had a change in marital status after the end of the tax year on December 31, 2014.
- The applicant, or parent or spouses, as applicable, who have filed an amended tax return.

In general, all applicants who have already filed but elect to not use the retrieval process will be subject to being selected for verification based upon the risk they pose to federal funds and, if they are selected, will be required to support their reported FAFSA data with information obtained directly from the IRS.