

2016-2017 Instructions for using the IRS Data Retrieval Tool

The federal verification process is to confirm that the income information reported on the Free Application for Federal Student Aid (FAFSA) is accurate.

PLEASE NOTE: The IRS Data Retrieval Tool will be available within 2-3 weeks of electronically filing the 2015 IRS Income Tax Return or within 6-8 weeks of filing a paper return.

Follow the below steps to utilize the IRS Data Retrieval to transfer student and/or parent(s) tax data into the FAFSA:

1. Log-in to your FAFSA at www.fafsa.ed.gov.
2. Once logged in click on **“Make Corrections to a Processed FAFSA”** if the FAFSA has previously been submitted
3. Enter all required information. The IRS Data Retrieval tool will appear at the **“Financial Information”** section of the FAFSA

The screenshot shows the FAFSA application interface. At the top, it says "START HERE GO FURTHER FEDERAL STUDENT AID" and "FAFSA Free Application for Federal Student Aid". Below this is a navigation bar with tabs: "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information" (highlighted in yellow), "Sign & Submit", and "Confirmation". The "Student Demographic Information" section is active, showing fields for "Your last name" (Eagle), "Your first name" (Ernie), and "Your middle initial". A "Help and Hints" sidebar on the right shows "Student's Last Name Question 1".

4. You will be prompted to answer “For 2015, have your parents (if dependent) completed their IRS income tax return or another tax return?” There is a drop down box that will allow you to pick one of three options: will file, not going to file and already completed. If student filed a 2015 tax return you must go to student section and complete this same process.

Select **“Already completed and your filing status according to your 2015 tax return.”** This will prompt the following questions:

Examples:

The screenshot shows the FAFSA application interface at the "Student Tax Information" section. The navigation bar is the same as in the previous screenshot. The "Student Tax Information" section contains the following questions and options:

- For 2015, have you completed your IRS income tax return or another tax return?
Already completed (selected)
- For 2015, what is your tax filing status according to your tax return?
Single (selected)
- To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):
 - Did you file a Form 1040X amended tax return?
 Yes No
 - Did you file a Puerto Rican or foreign tax return?
 Yes No
 - Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
 Yes No

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Buttons at the bottom include: LINK TO IRS, CHECK FOR ERRORS, PREVIOUS, NEXT, NEED HELP?, SAVE, CLEAR ALL DATA, VIEW FAFSA SUMMARY, EXIT.

Help and Hints sidebar: Student Filed 2015 Income Tax Return? Question 32. You must select the answer that describes your tax filing status:

- Already completed
- Will file
- Not going to file

If you indicate you "Will file" a 2015 tax return and your 2015 income is similar to your 2014 income, use your 2014 income tax return to provide estimates for questions about your income. If your income is not similar, click Income Estimator for assistance estimating your adjusted gross income, and answer the remaining questions about your income to the

If student

and/or parent(s) check **“YES”** to any of the above responses, you must request a 2015 **Tax Transcript** from the IRS. You can do so by going online at www.IRS.gov, or by telephone at 1-800-908-9946.

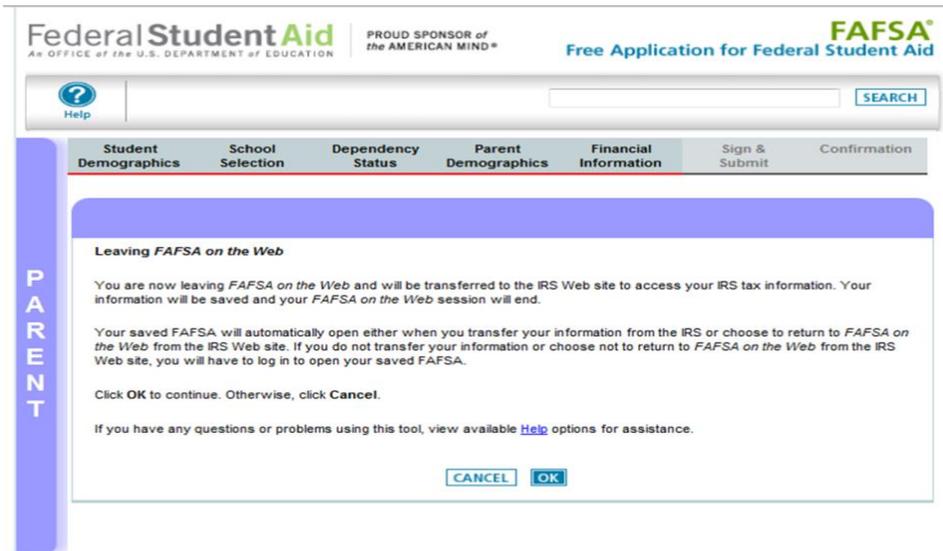
Reasons why the IRS Data Retrieval Tool may not be available:

- *Your filing status is Married, Filing Separately (if married)
- *Your filing status is Head of Household (if married)
- *You filed an amended return
- *You filed a foreign tax return
- *You was a victim of IRS identity theft (contact your school’s Office of Financial Aid)
- *If you owe taxes after completing your 2015 tax return

PLEASE NOTE: *If parents are married and filed married filing separate, both parents need to request their 2014 tax transcript from the IRS.*

If you check **“NO”** to all the responses then you should be able to use the IRS Data Retrieval Tool.

Your FAFSA will then be saved and site exit message will display: Click OK.



- On the IRS website, enter all requested information. Please make sure you enter your 2015 filing status as shown on your tax return.

Get My Federal Income Tax Information

Enter the following information from your 2015 Federal Income Tax Return.

First Name *	First Name
Last Name *	Last Name
Social Security Number *	*** - ** - 1020
Date of Birth *	01 / 01 / 2015
Filing Status *	Single
Address - Must match your 2015 Federal Income Tax Return	
Street Address *	
P.O. Box (Required if entered on your tax return)	
Apt. Number (Required if entered on your tax return)	
Country *	United States
City, Town or Post Office *	
State/US Territory *	Select One
ZIP Code *	

Return to FAFSA | Submit

****Ensure that all information entered exactly matches the information recorded on your tax return. This process is case sensitive.** Once the IRS validates your identification your IRS tax information will display. You will then be given the option to transfer your information or return to the FAFSA where you will be asked to manually enter your information. Also, if dependent and student filed a 2015 tax return, student will need to link his/her income information by using the Data Retrieval tool.

- After clicking **Transfer Now** you will get a response that reads “You have successfully transferred your 2015 tax return information.” *****Important!!! Please do not change any IRS transferred data.**

Parent 2015 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers
Tax Year	2015	
Name(s)	Gift Data	
Social Security Number	*** - ** - 2656	
Filing Status	Married-Filed Joint Return	Question 82 on the FAFSA
Type of Tax Return Filed	1040	Question 81 on the FAFSA
Adjusted Gross Income	\$33,400	Question 85 on the FAFSA
Income Earned From Work	\$35,430	Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Parent 1: Question 88 on the FAFSA and/or Parent 2: Question 89 on the FAFSA
Income Tax	\$8,900	Question 86 on the FAFSA
IRS Exemptions	1	Question 87 on the FAFSA
Education Credits	\$5,900	Question 93a on the FAFSA
IRA Deductions and Payments	\$4,400	Question 94b on the FAFSA
Tax-Exempt Interest Income	\$4,650	Question 94d on the FAFSA
Untaxed IRA Distributions	\$7,900	Question 94e on the FAFSA
Untaxed Pensions	\$6,900	Question 94f on the FAFSA

Transfer My Tax Information into the FAFSA
The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

Do Not Transfer My Tax Information and Return to the FAFSA
By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.

Transfer Now | Do Not Transfer

You are NOT DONE YET!! Be sure to continue on to the signature page and electronically sign your FAFSA with your FSA password. If you are not requested to sign with your password, read and agree with the terms then submit the application. You are not finished until you have received a confirmation number and Expected Family Contribution (EFC) number. To complete verification you must also submit a signed copy of the verification worksheet.