

Step-by-Step Instructions for Using the IRS Data Retrieval Tool on the FAFSA

To use the IRS data Retrieval Tool you must first file your tax return and wait 3 weeks if you file electronically, or 11 weeks if you mail in your returns.

After that time period, go back to <https://fafsa.ed.gov>, click “login,” and enter your “student information.” On the welcome page, choose the option to “Make FAFSA Corrections.” Enter your PIN, create a password, and then navigate past the “introduction page” to the tab for “financial information” listed below. Both you and your parents (if applicable) will need to go to your separate financial information sections on the FAFSA

1. When you get to the step for “student/parent tax information” you will be prompted to answer whether you have completed your tax return.

The screenshot shows the FAFSA website interface. At the top, there is a navigation bar with tabs for Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Financial Information' tab is selected. Below the navigation bar, there is a 'Parent Tax Information' section. A green checkmark icon indicates that the application was successfully saved. The question asks: 'For 2011, have your parents completed their IRS income tax return or another tax return?' with a dropdown menu set to 'Select'. There are 'PREVIOUS' and 'NEXT' buttons. At the bottom of the form, there are buttons for 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. On the right side, there is a 'Help and Hints' section titled 'Parents Filed 2011 Income Tax Return? Question 79'. The help text explains that the question asks whether or not parents have filed or will file a 2011 income tax return, and provides instructions for parents who are now married.

Use the drop-down menu to indicate that you/your parent’s IRS income tax return have been “already completed.”

2. Once you select this option, a box will appear with a few more questions regarding the type of tax return that was completed. If the answer to all the questions is “no” then a second box will appear.

The screenshot shows the FAFSA website interface for the 2013 tax year. The 'Parent Tax Information' section is displayed. A green checkmark icon indicates that the application was successfully saved. The question asks: 'For 2013, has your mother completed her IRS income tax return or another tax return?' with a dropdown menu set to 'Already completed'. Below this, there is another question: 'For 2013, what is your mother's tax filing status according to her tax return?' with a dropdown menu set to 'Single'. A new box appears with the following text: 'You, the mother, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.' Below this text are three questions with radio button options: 'Did you, the mother, file an amended tax return?' (Yes/No), 'Did you, the mother, file a Puerto Rican or foreign tax return?' (Yes/No), and 'Did you, the mother, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?' (Yes/No). On the right side, there is a 'Help and Hints' section titled 'Parents Filed 2013 Income Tax Return? Question 80'. The help text explains that the question asks whether or not parents have filed or will file a 2013 income tax return, and provides instructions for parents who are now married.

(The questions will restrict you from using the IRS Data Retrieval option if you indicate that any of the following apply:

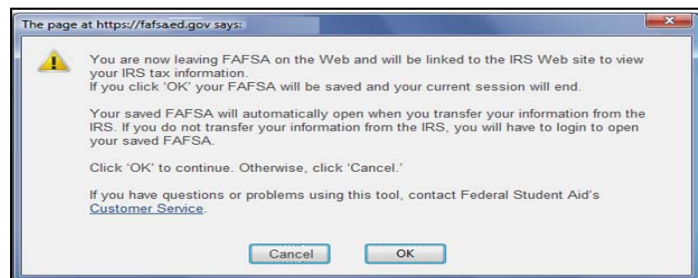
- Your marital status changed after December 31st (from the Tax Year requested)
- You or they filed “married filing separately”
- You or they indicated “married” on the FAFSA but filed “head of household” on the tax return
- You or they filed an amended return
- You or they filed a foreign tax return

You may later be required to request a tax transcript from the IRS.)

3. The second box that appears will prompt you to select your status (Student/Mother/Father/Step-Parent) and enter your PIN. Immediately after entering your PIN, click the “link to IRS” button.

The screenshot shows the FAFSA on the Web interface in a Mozilla Firefox browser window. The page title is "Parent Finances - Corrections - FAFSA on the Web - Federal Student Aid". The browser address bar shows the URL "https://fafsa.ed.gov/FAFSA/app/fafsa?execution=111". The page content includes a vertical "PARENT" label on the left, a green success message "Application was successfully saved.", and several questions about the mother's 2013 tax return. The questions are: "For 2013, has your mother completed her IRS income tax return or another tax return?" (dropdown: "Already completed"), "For 2013, what is your mother's tax filing status according to her tax return?" (dropdown: "Single"), "Did you, the mother, file an amended tax return?" (radio buttons: "No" selected), "Did you, the mother, file a Puerto Rican or foreign tax return?" (radio buttons: "No" selected), and "Did you, the mother, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?" (radio buttons: "No" selected). A blue box contains the text: "You, the mother, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS." Below this are three radio button questions. A recommendation states: "Based on your response, we recommend that you, the mother, transfer your information from the IRS into this FAFSA." Below this is a PIN entry field with a "LINK TO IRS" button and links for "Apply For A PIN" and "Forgot/Don't Know My PIN". At the bottom, there is a question: "What type of income tax return did your mother file for 2013?" (dropdown: "IRS 1040"). On the right side, there is a "Help and Hints" section titled "Parents Filed 2013 Income Tax Return? Question 80" with explanatory text and a dropdown menu.

4. If eligible to use the tool, you will be transferred to the IRS Website. FAFSA-on-the-Web will notify you that you are leaving the FAFSA website and entering the IRS website to complete the transfer of your tax information. **Click ok.**



- On the IRS Web site, you will be prompted to enter information as it appears on your tax return. It is important that you complete this section exactly as it appears on your tax return or your information may not match with IRS records and the data retrieval may not go through.

- Once the IRS has authenticated your identity, your IRS tax information will display. You may then choose to transfer your information from the IRS into your FAFSA by checking the “Transfer My Tax Information into the FAFSA” and clicking “Transfer Now” button (see below).

Tax Year	My Tax Information	FAFSA Question Numbers
Name (s)	<Joe & Jane>	
Social Security Number	<***-**-6789>	
Filing Status	<Married-Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question <##> on the FAFSA
Adjusted Gross Income	<\$126,721>	Question <##> on the FAFSA
Income Tax	<\$31,400>	Question <##> on the FAFSA
IRS Exemptions	<5>	Question <##> on the FAFSA
Education Credits	<\$2,500>	Question <##> on the FAFSA
IRA Deductions and Payments	<\$2,500>	Question <##> on the FAFSA
Tax-Exempt Interest Income	<\$2,500>	Question <##> on the FAFSA
Untaxed IRA Distributions	<-\$2,500>	Question <##> on the FAFSA
Untaxed Pensions	<-\$2,500>	Question <##> on the FAFSA

Print this page for your records before choosing an option below.

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. **Transfer Now**

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. **Do Not Transfer**

After you have transferred your data, you will be returned to the FAFSA-on-the-Web website to finish your application. **Make sure not to change any of the financial data that was imported from the IRS Website.** Remember that both you and your parents (if applicable) will need to go through a separate authentication process when filling out the Financial Information sections of the FAFSA.

7. To submit your updated FAFSA containing your/your parent's IRS date information you must click "submit my FAFSA now."

