

# IRS DATA RETRIEVAL TOOL

A Step by Step Tutorial

**Step 1:** Log into your FAFSA Account by selecting the choice on the left.

**Federal Student Aid**  
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of  
the AMERICAN MIND®

**FAFSA®**  
Free Application for Federal Student Aid

Home Help

SEARCH

### STUDENT

## Login

**Student Information**

Form Approved  
OMB No. 1845-0001  
App. Exp. 12/31/2016

Instructions are provided for each FAFSA question in the Help and Hints section on the right side of the page and are also available by clicking **Need Help?** at the bottom of the page.

Enter either your (the student's) FSA ID or personal information to log in to *FAFSA on the Web*.

**Enter your (the student's) FSA ID**

Enter the student's information

Do not log in with the FSA ID if you are not the student.

OR

**NEXT**

**NEED HELP?**

## Help and Hints

### Login Options

The FSA ID, which consists of a user-created username and password, replaced the PIN effective May, 2015. It allows users to electronically access personal information on Federal Student Aid Web sites as well as electronically sign a FAFSA.

Select one:

Enter your FSA ID (only the student should log in with an FSA ID),

Or

Enter the student's name, Social Security Number and date of birth. (You may have to enter your FSA ID later in

Site Last Updated: Sunday, May 10, 2015

Download [Adobe Reader](#)

If you have not created your FSA ID yet you should do this now. Otherwise enter your FSA ID and click 'next'.

**Login**

**Student Information**

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Enter either your (the student's) FSA ID or personal information to log in to *FAFSA on the Web*.

Enter your (the student's) FSA ID

Enter the student's information

Do not log in with the FSA ID if you are not the student. OR

[Create an FSA ID](#)

FSA ID Username or Verified E-mail Address

[Forgot Username](#)

FSA ID Password

[Forgot Password](#)

**NEXT**

**NEED HELP?**

**Help and Hints**

**Login Options**

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## Step 2. Select 'Make FAFSA Corrections'

### My FAFSA

Welcome, [REDACTED]

2015-2016

2014-2015

#### Current Application Status: Processed Successfully

Congratulations, your FAFSA was successfully processed.

#### What Happens Next

- Your FAFSA information was made available to the school(s) you listed on your FAFSA.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

#### Original Application

Submitted: 01/05/2015  
Processed: 01/06/2015

You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [Make FAFSA Corrections to](#) make a change, add a school, or transfer IRS data into your FAFSA

#### FSA ID

Last Time, Date FSA ID Used: 3:52, 06/25/2015

#### FSA ID Status:

[User Account Management](#)

You can use your FSA ID to sign your FAFSA electronically or make corrections to your FAFSA.



Create a shareable file with some of your student information.

[Learn More](#)

**Step 3.** Create a Save Key. Click next.



Home



Help

SEARCH

## Make Corrections to Your 2015-2016 FAFSA

Form Approved  
OMB No. 1845-0001  
App. Exp. 12/31/2016

### Create a Save Key.

The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

Create a Save Key

Re-enter Save Key

NEXT

NEED HELP?

MY FAFSA

## Help and Hints

### Create a Save Key

Enter the save key you created when you started this application or correction.

The save key is between 4 and 8 characters long. It can contain any combination of numbers and / or uppercase and lowercase letters. For example, the save key "Student2" is different than the save key "sTuDeNt2."

S  
T  
U  
D  
E  
N  
T

**Step 4:** Click the “Financial Information” toward the top of the page  
(If you are providing Parent(s) information, you will do the parent information first)

The screenshot shows the top navigation bar of the FAFSA application. On the left, there is a 'Help' icon (a question mark in a circle) and the text 'Federal Student Aid' with the subtitle 'An OFFICE of the U.S. DEPARTMENT of EDUCATION'. To the right of this is the text 'PROUD SPONSOR of the AMERICAN MIND®'. Further right is the 'FAFSA®' logo and the text 'Free Application for Federal Student Aid'. Below the logo and text is a search bar with a 'SEARCH' button. The navigation bar consists of several tabs: 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'Financial Information' tab is highlighted in yellow and has a small icon of four dots in a square next to it. Below the navigation bar, the text 'Student Financial Information' is visible on a blue background.

# Step 5: Answer "NO" for all of the pop up questions.)

**P**  
**A**  
**R**  
**E**  
**N**  
**T**


Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
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### Parent Tax Information

Application was successfully saved.

For 2014, has your mother completed her IRS income tax return or another tax return?  
Already completed ▾

For 2014, what is your mother's tax filing status according to her tax return?  
Head of Household ▾

 You, the mother, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.

Did you, the mother, file a Form 1040X amended tax return?  
 Yes  No

Did you, the mother, file a Puerto Rican or foreign tax return?  
 Yes  No

Did you, the mother, file 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, the mother, 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.

Enter your FSA ID and click [Link To IRS](#).

What is your (the parent's) FSA ID?

FSA ID Username or Verified E-mail Address

FSA ID Password

[Create an FSA ID](#)  
[Forgot Username](#)  
[Forgot Password](#)

[LINK TO IRS](#)

[PREVIOUS](#) [NEXT](#)

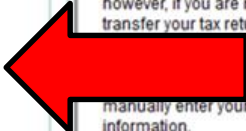
[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

### Help and Hints

#### Recently Filed Taxes?

If you, the parent(s), filed your taxes electronically within the last 3 weeks, or by mail within the last 11 weeks, select **Yes**; otherwise, select **No**.

If you filed your taxes within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#); however, if you are not able to transfer your tax return information from the IRS into this FAFSA at this time, you can manually enter your tax return information.



**Step 6.** If your parents have not created their FSA ID yet, they will need to do this now. Click on Create an FSA ID.  
Otherwise enter their FSA ID and password then click on the LINK TO IRS button.

Based on your response, we recommend that you, the mother, 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.

Enter your FSA ID and click [Link To IRS](#).

What is your (the parent's) FSA ID?

FSA ID Username or verified E-mail Address

FSA ID Password

[Create an FSA ID](#)  
[Forgot Username](#)  
[Forgot Password](#)  
[LINK TO IRS](#)

[PREVIOUS](#) [NEXT](#)

The image shows a web form for linking FSA ID information to a FAFSA. A red arrow on the left points towards the form. Another red arrow on the right points to the 'LINK TO IRS' button. The 'Create an FSA ID' link is highlighted in yellow. At the bottom of the form, there are 'PREVIOUS' and 'NEXT' navigation buttons.



### Leaving *FAFSA on the Web*

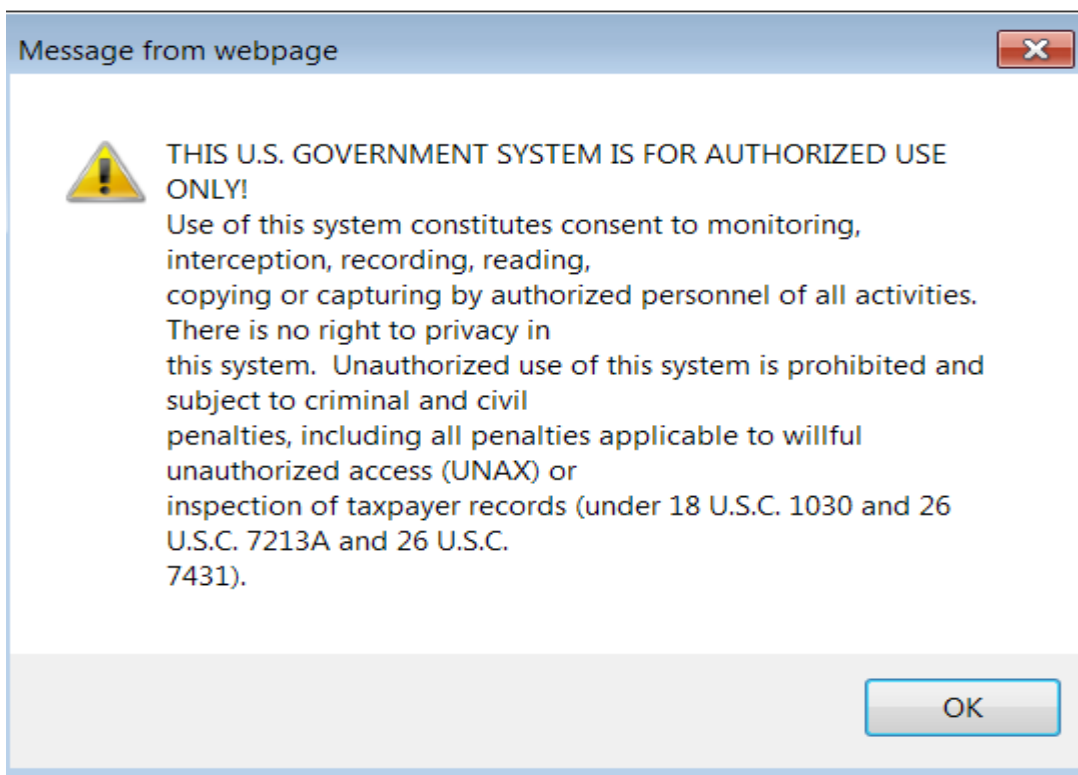
You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your information will be saved and your *FAFSA on the Web* session will end.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.

Click **OK** to continue. Otherwise, click **Cancel**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

CANCEL OK



**Step 7:** Complete the IRS form. Please note that the information must match what you put on your 2014 IRS Tax Return

**Step 8:** Click Submit

 [Return to FAFSA](#) | [Log Out](#) | [Help](#)

[Español](#)

### Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

**Enter the following information from your 2014 Federal Income Tax Return.** [?](#) Required fields \*

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	<input type="text"/>
Date of Birth *	<input type="text"/>
Filing Status * <a href="#">?</a>	Select One <input type="text"/>
Address - Must match your 2014 Federal Income Tax Return. <a href="#">?</a>	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) <a href="#">?</a>	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <input type="text"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One <input type="text"/>
ZIP Code *	<input type="text"/>

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

[IRS Privacy Policy](#)



**Step 9:** The web site should pull up a copy of your tax information. Check the first box under “Transfer my Tax Information into the FAFSA”

**Step 10:** Click the “Transfer Now” button

IRS.gov [Return to FAFSA](#) | [Log Out](#) | [Help](#)  
[Español](#)

### Student [REDACTED] 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	[REDACTED]	
Name(s)	[REDACTED]	
Social Security Number	[REDACTED]	
Filing Status	[REDACTED]	
Type of Tax Return Filed	[REDACTED]	Question 33 on the FAFSA
Adjusted Gross Income	[REDACTED]	Question 35 on the FAFSA
Income Earned From Work ?	[REDACTED]	Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Student: Question 38 on the FAFSA and/or Spouse: Question 39 on the FAFSA
Income Tax	[REDACTED]	Question 36 on the FAFSA
IRS Exemptions	[REDACTED]	Question 37 on the FAFSA
Education Credits	[REDACTED]	Question 43a on the FAFSA
IRA Deductions and Payments	[REDACTED]	Question 44b on the FAFSA
Tax-Exempt Interest Income	[REDACTED]	Question 44d on the FAFSA
Untaxed IRA Distributions ?	[REDACTED]	Question 44e on the FAFSA
Untaxed Pensions ?	[REDACTED]	Question 44f 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.

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](#) ?

**Step 11:** You will return to your FAFSA and it will say “You have successfully transferred your 2014 IRS tax information.” It will also say “Transferred from the IRS” next to the questions. You will have to answer any questions that do not say “Transferred from the IRS”

**NOTE: Do not change any answers that have been “Transferred from the IRS”**

Application was successfully saved.

You're almost done. You transferred your IRS tax information, and questions that were populated are marked with "Transferred from the IRS." To finish, you must sign and submit this application and receive a confirmation page.

For 2014, have you completed your IRS income tax return or another tax return? **Transferred from the IRS** Already completed

For 2014, what is your tax filing status according to your tax return? **Transferred from the IRS** Single

**You may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.**

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

You have already transferred your tax information from the IRS.  
[View option to link to the IRS](#)

**Transferred from the IRS**

What income tax return did you file for 2014?  
IRS 1040

What was your adjusted gross income for 2014? This amount is found on IRS Form 1040-line 37. **Transferred from the IRS** \$ 40,774.00

Your income earned from working (wages, salaries, tips, etc.) in 2014 was **transferred from the IRS**. This amount is the total of IRS Form 1040-lines 7+12+18. \$ 40,774.00

Did you file an IRS Schedule K-1 (Form 1065) for 2014?

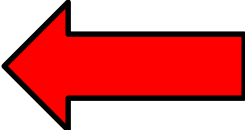
**Help**

**Student Fil Tax Qu**

You must s that descri status:

- Already c
- Will file
- Not going

If you indic a 2014 tax i 2014 incon your 2013 i 2013 incon provide est questions : income. If y not similar, **Estimator f** estimating gross incor



**REPEAT STEPS 5-10**  
**For Student Information**  
**(if providing Parent(s)**  
**information)**

**Step 12:** Click the “Sign & Submit” tab toward the top of the page

**Step 13:** You will see all the corrections made by doing the IRS Data Retrieval Tool. Scroll to the bottom of the page and click the “Next” button

Contact Us
Browse Help

Student Demographics
School Selection
Dependency
Parent
Financial Information
Sign & Submit
Confirmation

step 12

**List of Changes**

- i You corrected your FAFSA. Review the information on this page and click **Next** to sign and submit your corrections.
- ✓ Application was successfully saved.

This is a list of the FAFSA questions for which you corrected or confirmed your answers.  
Student ID: XXX-XX-0010 MO 01

**Student Demographics - No Change**

**School Selection - No Change**

**Dependency Status - No Change**

**Parent Demographics - No Change**

**Financial Information**

**Financial Information**

	Previous Response	Current Response	
33. What income tax return did you file for 2011?	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
35. What was your (and your spouse's) adjusted gross income for 2011?	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
97. Free or Reduced Price Lunch	[REDACTED]		
99. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	[REDACTED]		
36. Enter the amount of your (and your spouse's) income tax for 2011.	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
37. Enter your (and your spouse's) exemptions for 2011.	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
43a. Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040-line 49	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
44b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-total of lines 28+32	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
44d. Tax exempt interest income from IRS Form 1040-line 8b	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
44e. Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b). Exclude rollovers. If negative, enter a zero here	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
44f. Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b). Exclude rollovers. If negative, enter a zero here	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>

step 13

**Step 14:** Sign with your and/or your parent's FSA ID by typing in the FSA ID Username and Password. Also choose that you "Agree" to the statement.

**Step 15:** Click "SUBMIT MY FAFSA NOW"

You are finished!!!

The screenshot shows the 'Sign & Submit' section of the FAFSA application. At the top, a navigation bar includes tabs for Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit (highlighted), and Confirmation. The main content area has a blue header 'Sign & Submit' and a green-bordered box with a checkmark and the message 'Application was successfully saved.' Below this is a blue button 'VIEW OR PRINT YOUR FAFSA INFORMATION'. A question 'Are you a preparer?' has 'No' selected. The 'Student Signature' section contains fields for the student's Social Security Number, last name, and date of birth. A 'READ BEFORE PROCEEDING' box lists four terms of agreement, with the fourth term partially visible: '4. will notify your school if you default on a federal student loan, and'. Below this, 'Disagree' is selected. The 'FSA ID' section has fields for Username or Verified E-mail Address and Password, with a 'SIGN' button. A callout box says 'Don't have an FSA ID? Create an FSA ID. It takes only a few minutes.' At the bottom, there are 'PREVIOUS' and 'SUBMIT MY FAFSA NOW' buttons. A 'Help and Hints' sidebar on the right explains the role of a preparer. Three large red arrows point to the 'VIEW OR PRINT YOUR FAFSA INFORMATION' button, the 'Disagree' radio button, and the 'SUBMIT MY FAFSA NOW' button.

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
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### Sign & Submit

Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a preparer?  
 Yes  No

#### Student Signature

Student's Social Security Number: [REDACTED]  
Student's last name: [REDACTED]  
Student's date of birth: [REDACTED]

**READ BEFORE PROCEEDING**

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

- will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
- are not in default on a federal student loan or have made satisfactory arrangements to repay it,
- do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
- will notify your school if you default on a federal student loan, and

I, the student, agree to the terms outlined above.  
 Agree  Disagree

What is your (the student's) FSA ID?  
Do not enter the FSA ID if you are not the student.  
FSA ID Username or Verified E-mail Address: [REDACTED]  
FSA ID Password: [REDACTED]

[Don't have an FSA ID? Create an FSA ID. It takes only a few minutes.](#)

[Other options to sign and submit](#)

#### Help and Hints

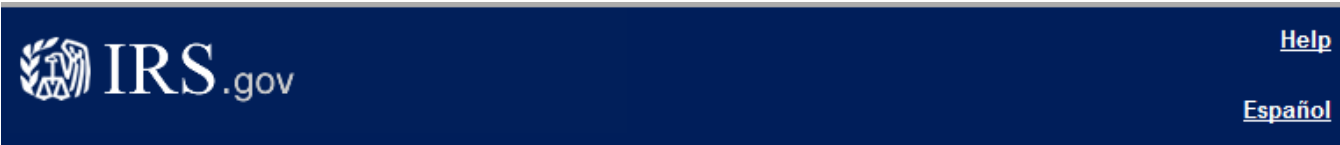
##### Are you a preparer?

A preparer is anyone who charges a fee for helping you fill out your FAFSA.

Typically high school counselors, school financial aid administrators, or other mentors do not charge a fee to help you complete your application, so they are not considered preparers unless you paid them for their services.

If you are a preparer, select **Yes**.

If for some reason you get this while trying to find your tax information, click the return to fafsa button. The go to the IRS website and request a return transcript be mailed to you.



We are unable to provide you with your Federal Income Tax Information.

### What went wrong?

- **You may have recently filed a Federal Income Tax Return for 2013.**  
If you recently filed your taxes your IRS information may not be available yet. If you filed your taxes electronically, it may take 2-3 weeks; but if you filed your taxes via the mail it may take 8-11 weeks.  
  
You can use your personal copies of your tax returns and complete the FAFSA. You could also wait until your IRS information becomes available before submitting your FAFSA, but you should keep in mind any deadlines.
- **You may not have filed a Federal Income Tax Return for 2013.**  
Return to the FAFSA to review your previous answers.

Close Window

Return to FAFSA