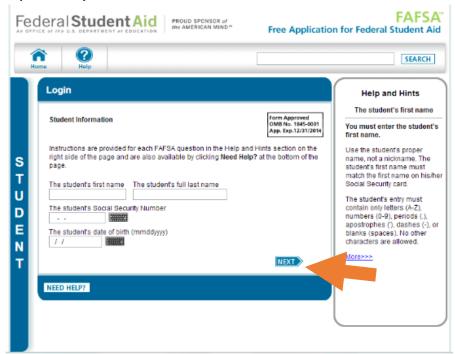# IRS Data Retrieval Tool for FAFSA

Students who filed the 2015-2016 Free Application for Federal Student Aid (FAFSA) using estimated income or 2013 tax return information will need to update their FAFSA information once 2014 tax returns have been filed. The quickest and most accurate way to do this is to use the IRS Data Retrieval Tool. To qualify for this service, it is recommended that families allow three (3) weeks after submitting an electronic tax return filing or eleven (11) weeks after submitting a paper return to ensure the IRS has fully processed your information and made it available for data retrieval.

Please note that some of the screen shots used in these directions may show previous school years. To update your 2015-2016 FAFSA information, be sure you always choose tabs or drop-downs that say 2015-2016 FAFSA or 2014 Tax Year.

Step 1: Go to www.fafsa.ed.gov and click "Login."

Step 2: Enter your Student information and click "Next."

Step 3: Click "Make FAFSA Corrections."

Step 4: Enter your Federal Student Aid 4 digit PIN. If you don't know or can't remember your PIN, click the "I Forgot/Don't Know My PIN" link or visit http://www.pin.ed.gov and request a duplicate PIN. Create and enter a password and click "Next."

Step 5: Click on the "Financial Information" tab. Select "Already Completed" for the 2014 tax return filing status and answer the eligibility questions.

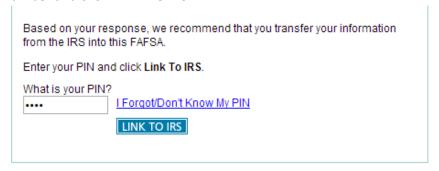**Step 6: If you are eligible to use the IRS Data Retrieval Tool you will be prompted to enter your PIN number and click "LINK TO IRS."**

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA.

Enter your PIN and click **Link To IRS**.

What is your PIN?

`····`   I Forgot/Don't Know My PIN

LINK TO IRS

Step 7: Click "OK" to leave the FAFSA website and enter the IRS Data Retrieval Tool website.

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

S T U D E N T

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 8: Click "OK" to accept the IRS Data Retrieval Tool terms of use.

The page at https://sa2.www4.irs.gov says:

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!
Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

OK

Step 9: Enter the requested information and click "Submit." Remember to enter your address exactly as it appeared when you filed your taxes.

Get My Federal Income Tax Information

See our Privacy Notice regarding our request for your personal information.

Enter the following information as it appears on your 2012 Federal Income Tax Return. ❓   Required fields *

First Name *	John
Last Name *	Doe
Social Security Number *	*** - ** - 6375
Date of Birth *	05 / 17 / 1962
Filing Status * ❓	Married-Filed Joint Return ↕
Address - Must match your 2011 Federal Income Tax Return. ❓	
Street Address *	123 Main Street
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 *	Anytown
State/U.S. Territory *	California (CA) ↕
ZIP Code *	91234

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.
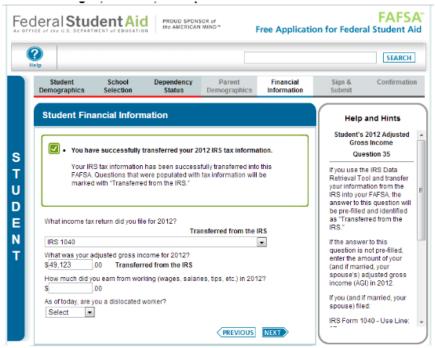
(Return to FAFSA)   (Submit)

Step 10: Review the information that the IRS has retrieved from your tax returns. Check the box to "Transfer My Tax Information to the FAFSA" and click "Transfer Now." Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.

	My Tax Information	FAFSA Question Numbers ❓
Tax Year	2012	
Name(s)	John Doe	
Social Security Number	***-**-6375	
Filing Status	Married-Filed Joint Return	
Type of Tax Return Filed	1040	Question 33 on the FAFSA
Adjusted Gross Income	$49123	Question 35 on the FAFSA
Income Earned From Work ❓	$46444	Question 38 on the FAFSA
Income Tax	$4123	Question 36 on the FAFSA
IRS Exemptions	4	Question 37 on the FAFSA
Education Credits	$1000	Question 43a on the FAFSA
IRA Deductions and Payments	$0	Question 44b on the FAFSA
Tax-Exempt Interest Income	$0	Question 44d on the FAFSA
Untaxed IRA Distributions ❓	$0	Question 44e on the FAFSA
Untaxed Pensions ❓	$0	Question 44f on the FAFSA

🖨 Print ... or 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) ❓

Step 11: Do not update any answers that say "Transferred from the IRS: or your school may require you to supply additional documentation. Answer the question(s) asking how much was earned in wages, salaries, and tips and click "Next."

Note: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financial Information section and once under the Parent Financial Information section before submitting the FAFSA.

Step 12: Continue to the "Sign & Submit" tab. Enter your PIN number and click "Sign." Then agree to the Terms of Agreement and click "Submit My FAFSA Now."