

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."

The screenshot shows the FAFSA login page. On the left is a vertical blue bar with the word "STUDENT" in white. The main content area has a blue header with "Federal Student Aid" and "FAFSA" logos. Below the header is a navigation bar with "Home" and "Help" links. The "Login" section contains a "Student Information" form with fields for first name, last name, Social Security Number, and date of birth. A "NEXT" button is at the bottom of the form. To the right is a "Help and Hints" section. An orange arrow points from the "NEXT" button to the "More>>>" link in the "Help and Hints" section.

STUDENT

Login

Student Information

Form Approved
OMB No. 1845-0001
App. Exp. 12/31/2014

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.

The student's first name:

The student's full last name:

The student's Social Security Number:

The student's date of birth (mmddyyyy):

NEXT

NEED HELP?

Help and Hints

The student's first name

You must enter the student's first name.

Use the student's proper name, not a nickname. The student's first name must match the first name on his/her Social Security card.

The student's entry must contain only letters (A-Z), numbers (0-9), periods (.), apostrophes ('), dashes (-), or blanks (spaces). No other characters are allowed.

[More>>>](#)

Step 3: Click "Make FAFSA Corrections."

The screenshot shows the "My FAFSA" page. On the left is a vertical blue bar with the word "STUDENT" in white. The main content area has a blue header with "My FAFSA" and "Welcome" text. Below the header is a navigation bar with "2013-2014" and "2012-2013" links. The "Current Application Status: Processed Successfully" section contains a congratulatory message and a list of "What Happens Next" steps. To the right is a box with "Original Application" details. Below the "What Happens Next" section are two buttons: "VIEW PROCESSED INFORMATION (PDF VERSION)" and "VIEW PROCESSED INFORMATION (HTML VERSION)". At the bottom, a "You can also:" section contains a link to "Make FAFSA Corrections". An orange arrow points from this link to the "Make FAFSA Corrections" text.

STUDENT

My FAFSA

Welcome

2013-2014 2012-2013

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).

VIEW PROCESSED INFORMATION (PDF VERSION)

VIEW PROCESSED INFORMATION (HTML VERSION)

Original Application

Submitted: 02/06/2013
Processed: 02/07/2013
DRN: 7503

You can also:

- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA.

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."

Make Corrections to Your 2013-2014 FAFSA

Form Approved
OMB No. 1845-0001
App. Exp. 12/31/2014

Enter your PIN and create a password.
You will need this password if you want to return later to your saved FAFSA.

Student's PIN [I Forgot/Don't Know My PIN](#)

Create a Password

Re-enter Password

NEXT

[NEED HELP?](#) [MY FAFSA](#)

Help and Hints
Student's PIN

A Federal Student Aid PIN is a 4-digit numeric code or 6-digit alphabetic code that is uniquely assigned to an individual to access Federal Student Aid Web sites.

If you do not remember your PIN, you may request a duplicate by clicking "I Forgot/Don't Know My PIN."

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

Student Tax Information

☒ Application was successfully saved.

For 2012, have you completed your IRS income tax return or another tax return?

☐ You may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Did you file an 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 6 weeks)?
☐ Yes ☐ No

PREVIOUS **NEXT**

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

Help and Hints
Student Filed 2012 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 2012 tax return and your 2012 income is similar to your 2011 income, use your 2011 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

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

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
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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 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](#) ?

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.”