

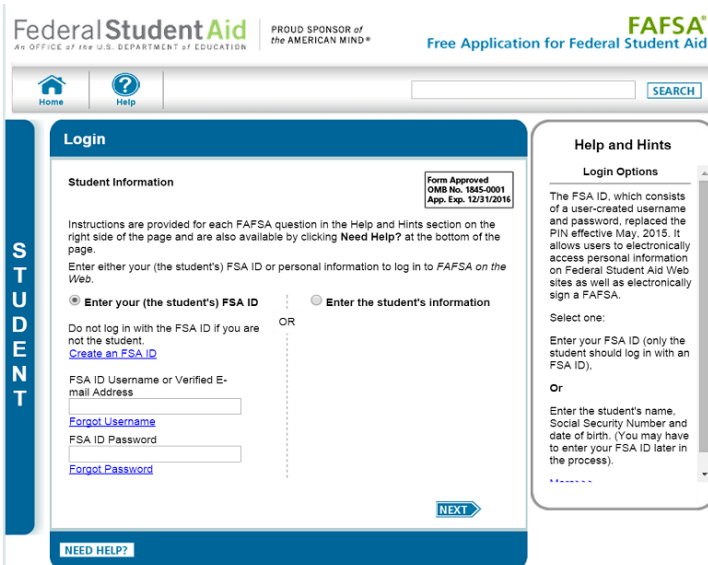
FAFSA IRS Data Retrieval Tool Instructions

Easily transfer tax information using the IRS Data Retrieval Tool on the FAFSA. This saves time, confusion, and mistakes. When the IRS Data Retrieval tool is used, it stays with the FAFSA; schools will not require paper copies to be submitted.



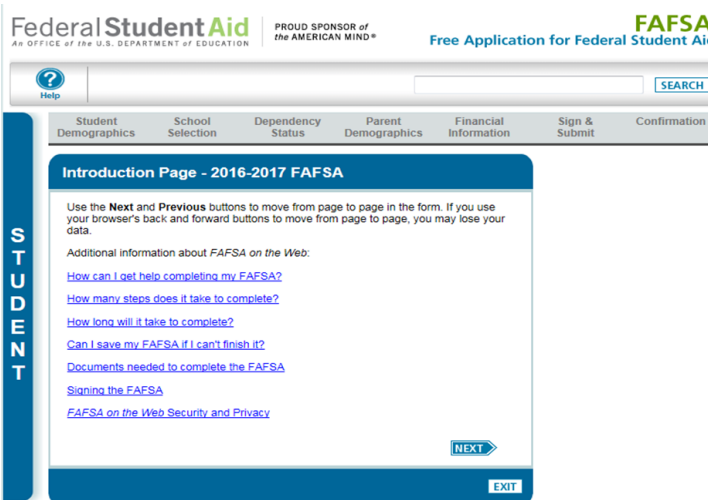
The FAFSA Home Page features the Federal Student Aid logo and the FAFSA logo. It includes a navigation bar with links for Home, About Us, PIN Site, StudentAid.gov, and Help. A search bar is located in the top right corner. The main heading is "Get help paying for college" with the subtext "Submit a Free Application for Federal Student Aid (FAFSA)". Below this is a banner image showing a group of diverse students. Two main sections are present: "New to the FAFSA?" with a "Start A New FAFSA" button, and "Returning User?" with a list of options (Make a correction, Add a school, View your Student Aid Report (SAR), and more...) and a "Login" button.

1. Go to <https://www.fafsa.ed.gov>



The FAFSA Login Page has a "Login" section on the left and a "Help and Hints" section on the right. The "Login" section includes "Student Information" and instructions for logging in. It offers two options: "Enter your (the student's) FSA ID" (selected) and "Enter the student's information". The "Enter your (the student's) FSA ID" option includes fields for "FSA ID Username or Verified E-mail Address" and "FSA ID Password", with links for "Forgot Username" and "Forgot Password". A "NEXT" button is at the bottom. The "Help and Hints" section includes "Login Options" and explains the FSA ID process.

2. Login using the FSA ID



The FAFSA Introduction Page is titled "Introduction Page - 2016-2017 FAFSA". It includes a navigation bar with links for Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The main content area provides instructions on using the "Next" and "Previous" buttons and lists several helpful links: "How can I get help completing my FAFSA?", "How many steps does it take to complete?", "How long will it take to complete?", "Can I save my FAFSA if I can't finish it?", "Documents needed to complete the FAFSA", "Signing the FAFSA", and "FAFSA on the Web Security and Privacy". "NEXT" and "EXIT" buttons are at the bottom.

3. Select next to continue with the FAFSA by entering data in the required fields.

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Help SEARCH

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

STUDENT

Student Tax Information

Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return? (Already completed) [X]

For 2015, what is your tax filing status, according to your tax return? (Married-Filed Joint Return) [X]

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? [X] Yes [] No

Did you file a Puerto Rican or foreign tax return? [X] Yes [] No

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)? [X] 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.

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

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

FSA ID Username or Verified E-mail Address [Forgot Username](#) [Forgot Password](#)

FSA ID Password [LINK TO IRS](#)

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?

If you filed your taxes electronically within the last three weeks, or by mail within the last eleven 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 into your FAFSA at this time, you can try again in a week or two or you can manually enter your tax return information.

4. Select that you have already completed your tax return for 2015. You will be prompted with the following questions:
 - a. Do you file amended 1040x? This is for extension and late tax filers. If you filed by April 15, select 'No'.
 - b. Do you file foreign tax returns? Select 'No' if you only file taxes in the United States.
 - c. Did you file electronically in the last 3 weeks or by mail in the last 3 months? If not, select 'No'.

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Help SEARCH

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

STUDENT

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

5. The parent who set up their own FSA ID may now indicate which parent they are (Parent 1 or Parent 2). That parent may then enter their FSA ID and click on the link that says 'link to IRS'

6. You will be notified that you are leaving the FAFSA website. You will be taken to an IRS page where you will enter your information.

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

IRS.gov [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 2015 Federal Income Tax Return. [?](#) **Required fields ***

First Name *	Dependent
Last Name *	Data
Social Security Number *	*** - ** - 2581
Date of Birth *	01 / 01 / 1994
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/U.S. Territory *	Select One
ZIP Code *	

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](#)

7. Enter the information **EXACTLY** as it appeared on your tax return. **DO NOT** use punctuation. *E.g. If your tax returns say your address is 1889 Perimeter Drive but you enter 1889 Perimeter Dr. you will receive an error message.*

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

Student 2015 Federal Income Tax Information

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

Tax Year	My Tax Information	FAFSA Question Numbers ?
2015	Dependent Data	
Name(s)	Dependent Data	
Social Security Number	*** - ** - 2581	
Filing Status	Single	Question 34 on the FAFSA
Type of Tax Return Filed	1040EZ	Question 33 on the FAFSA
Adjusted Gross Income	\$9,750	Question 36 on the FAFSA
Income Earned From Work ?	\$20,125	Question 39 on the FAFSA
Income Tax	\$7,025	Question 37 on the FAFSA
IRS Exemptions	5	Question 38 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](#) [?](#)

[IRS Privacy Policy](#)

8. Make sure to transfer the information by clicking the 'Transfer Now' link.

Federal Student Aid [PROUD SPONSOR of the AMERICAN MIND®](#) **FAFSA®**
Free Application for Federal Student Aid

[Help](#) [SEARCH](#)

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

Student Financial Information

[?](#) You have successfully transferred your 2015 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS."

What income tax return did you file for 2015? **Transferred from the IRS**

IRS 1040A or 1040EZ

What was your adjusted gross income for 2015? This amount is found on IRS Form 1040A-line 21 or 1040EZ-line 4.
\$ 9,750.00 **Transferred from the IRS**

Your income earned from working (wages, salaries, tips, etc.) in 2015 was transferred from the IRS. This amount is found on IRS Form 1040A-line 7 or 1040EZ-line 1.
\$ 20,125.00

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

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

Help and Hints

Student's Type of 2015 Tax Form Used
Question 33

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

If the answer to this question is not pre-filled, you must select the income tax return that you filed or will file for 2015:

- IRS 1040
- IRS 1040A or 1040EZ
- A foreign tax return
- A tax return for a U.S. territory or a Freely Associated State (including Puerto Rico).

9. After the tax information is transferred from the IRS, be sure NOT to adjust any numbers. The tax transfer process will be unofficial if numbers are updated after the transfer. Continue with the FAFSA to completion with both student & parent signatures (using the FSA ID) and submit.