



2017-2018 IRS Data Retrieval Guide
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This sheet is a guide to help you through the process of updating your FAFSA, using the IRS Data Retrieval Tool. Login into the FAFSA website, www.fafsa.gov, click on “**Make FAFSA Corrections**” and enter the student’s PIN and Password. Review all information in the first three sections to make sure all information is correct.

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Home Help Welcome, john Logout SEARCH

My FAFSA

Welcome, john demoirs!

2017-2018

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: 01/01/2013
Processed: 01/02/2013
DRN: 7572

Latest Correction
Submitted: 01/03/2013
Submitted By: Student
Processed: 03/02/2013

You can also:

- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA
- [View Correction History](#) to view corrections made to your FAFSA

When the “**Financial Information**” section is reached, select “**Already completed**” to the question, “For 2015, have you completed your IRS income tax return or another tax return?”

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Help SEARCH

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

Student Tax Information

☒ Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?

Select

Select

Already completed

Will file

Not going to file

PREVIOUS **NEXT**

NEED HELP? **SAVE** **CLEAR ALL DATA** **VIEW FAFSA SUMMARY** **EXIT**

Help and Hints

Student Filed 2015 Income Tax Return?

Question 32

You must select the answer that describes your tax filing status:

- Already completed
- Will file
- Not going to file

Read and check any boxes that might apply to your situation to see if you qualify to use the tool. If you are able to check “**None of the above,**” you should be able to use the IRS Data Retrieval Tool. Click the

“Link to IRS” button to be redirected to the IRS website and transfer your current tax information into your FAFSA.

The screenshot shows the FAFSA Student Tax Information screen. At the top, the Federal Student Aid logo is on the left, and the FAFSA logo is on the right. Below the logos is a navigation bar with tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The Financial Information tab is selected. The main content area is titled "Student Tax Information" and contains a green checkmark icon with the text "Application was successfully saved." Below this, it asks "For 2015, have you completed your IRS income tax return or another tax return?" with a dropdown menu set to "Already completed". A section titled "You may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS." contains a list of checkboxes: "My tax filing status is Married Filing Separately", "My tax filing status is Head of Household", "I filed an amended tax return", "I filed a Puerto Rican or foreign tax return", "I recently filed my taxes", and "None of the above" (which is checked). Below this list, it says "Based on your response, we recommend that you transfer your information from the IRS into this FAFSA." and has a "LINK TO IRS" button. On the right side, there is a "Help and Hints" box titled "Student Filed 2015 Income Tax Return? Question 32" with instructions and a list of options: "Already completed", "Will file", and "Not going to file". At the bottom, there are "PREVIOUS" and "NEXT" buttons.

Read the next screen and select “OK,” agreeing to be redirected to the IRS website.

The screenshot shows the FAFSA Leaving FAFSA on the Web screen. At the top, the Federal Student Aid logo is on the left, and the FAFSA logo is on the right. Below the logos is a navigation bar with tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The Financial Information tab is selected. The main content area is titled "Leaving FAFSA on the Web" and contains the following text: "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 login 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." At the bottom, there are "CANCEL" and "OK" buttons.

The IRS.gov website should open. Fill in the appropriate information and click “Submit.” Make sure that the address you put into this form, matches the address used on your 2015 Federal Income Tax Return.

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 2014 Federal Income Tax Return.



Required fields *

First Name *	
Last Name *	
Social Security Number *	
Date of Birth *	/ /
Filing Status *	Select One
Address- Must match your 2015 Federal Income	
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](#)

The Federal Income Tax Return information which will be transferred will appear on a new screen. Review the information and check the box next to “**Transfer My Tax Information into the FAFSA**” and click “**Transfer Now.**”

	My Tax Information	FAFSA Question Numbers
Tax Year	2015	
Name(s)		
Social Security Number	*** - **	
Filing Status	Married-Filed Joint Return	
Type of Tax Return Filed	1040	Question 33 on the FAFSA
Adjusted Gross Income	\$106,058	Question 35 on the FAFSA
Income Earned From Work	\$106,848	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	\$9,862	Question 36 on the FAFSA
IRS Exemptions	2	Question 37 on the FAFSA
Education Credits	\$1,594	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 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](#)

The relevant Federal Income Tax Return information has been transferred from the IRS to your FAFSA. For a dependent student, repeat the steps to transfer parent tax information. **Please do not make changes to any information that has been transferred. You are not finished until this correction is signed by the student and parent if necessary, using the Federal PIN's and submitted to be processed.**