

Step By Step Instructions For Using The IRS Data Retrieval Tool

Follow these steps if you did not originally request IRS Data Retrieval transfer to your FAFSA.

Step 1: Log into your FAFSA (www.FAFSA.GOV) and click on “Login”. *Fig 1.1*

Step 2: Enter student’s information. *Fig 1.2*

Fig 1.1

The screenshot shows the FAFSA homepage. At the top, it says "Federal Student Aid" and "FAFSA™ Free Application for Federal Student Aid". Below this is a navigation bar with icons for Home, About Us, PIN Site, StudentAid.gov, and Help. A search bar is also present. 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 of diverse students. Two main sections are visible: "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", and "View your Student Aid Report (SAR), and more...". A "Login" button is also present in the "Returning User?" section.

Fig 1.2

The screenshot shows the FAFSA login page. At the top, it says "Federal Student Aid" and "FAFSA™ Free Application for Federal Student Aid". Below this is a navigation bar with icons for Home and Help. A search bar is also present. The main heading is "Login". On the left side, there is a vertical "STUDENT" label. The "Student Information" section includes a "Form Approved" stamp (OMB No. 1845-0001, App. Exp. 12/31/2014) and instructions: "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 form fields are: "The student's first name" (text input), "The student's full last name" (text input), "The student's Social Security Number" (text input with a mask), and "The student's date of birth (mmddyyyy)" (text input with a mask). A "NEXT" button is at the bottom right of the form. A "NEED HELP?" button is at the bottom left. On the right side, there is a "Help and Hints" section titled "The student's first name" with instructions: "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." A "More>>>" link is at the bottom of the "Help and Hints" section.

***Since your FAFSA has already been processed and you are going back in to do the IRS Data Retrieval, then once you have entered the student information click on ‘Continue’ button (*Fig 1.2b*). Enter the ‘Password’ (not your PIN) (*Fig 1.2c*) you created, enter it here, if you forgot your password then click ‘I Forgot My Password’ and an email will be sent to reset it.

Fig 1.2b

The screenshot shows the 'My FAFSA' page for the 2015-2016 academic year. The user is logged in as 'demolastrname'. The current application status is 'Not Submitted'. A message asks if the user wants to continue where they left off. A red circle highlights the 'CONTINUE' button, and a red arrow points to it from the right. Below this, there is an 'OR' separator and a 'START OVER' button. The page also displays the user's Federal Student Aid PIN status as 'Active' and provides a link to request a duplicate PIN. A vertical 'STUDENT' label is on the left side of the page.

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Welcome, demolastrname | Logout | SEARCH

My FAFSA

Welcome, demolastrname larry!

2015-2016 | 2014-2015

Current Application Status: Not Submitted

You started a 2015-2016 FAFSA but have not submitted it. Would you like to continue where you left off?

CONTINUE

OR

You can also start over.

START OVER

Federal Student Aid PIN

PIN Status: Active | [Request A Duplicate PIN](#)

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

NEED HELP?

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Fig 1.2c

The screenshot shows the 'Continue Your 2015-2016 FAFSA' page. It prompts the user to enter the password they created when they began their 2015-2016 FAFSA. A red circle highlights the password input field and the 'Forgot My Password' link, with a red arrow pointing to the link from the right. A 'NEXT' button is visible to the right of the password field. A 'Help and Hints' sidebar on the right provides password requirements. A vertical 'STUDENT' label is on the left side of the page.

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Continue Your 2015-2016 FAFSA

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

Enter the password you created when you began your 2015-2016 FAFSA.

Password | [Forgot My Password](#)

NEXT

NEED HELP? | MY FAFSA

Help and Hints

Password

You must enter a password.

The password must be between 4 and 8 characters long. You can use any combination of numbers and / or uppercase and lowercase letters. For example, the password "Student2" is different than the password "sTuDeNt2."

Try to choose a password that you can remember but that would be hard for others to guess. Avoid using personal identifiers (for example, first name, last name, or date of birth) and simple passwords such as "1234" or "aaaa."

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Step 3: Click on the top tab “Financial Information”. You will be prompted to answer, “For 2014, have your parents completed their IRS income tax return or another tax return?”. In the drop down box select the appropriate option. If you selected “*Already Completed*” it will prompt you to the next section. Otherwise, you are not able to use the IRS Data Retrieval. *Fig 1.3*

Fig 1.3

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Free Application for Federal Student Aid

Help

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

Parent Tax Information

Application was successfully saved.

For 2014, have your parents completed their IRS income tax return or another tax return?
Select
Already completed
Not going to file

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints
Parents Filed 2014 Income Tax Return?
Question 80
This question asks whether or not your **parents** have filed or will file a 2014 income tax return. If your parents are now married (even if they were not married in 2014) answer this question about them as a couple. If your parents are either not married, divorced, separated, or widowed, answer this question about the parent who is reporting financial information on this application.
Select the option that indicates your parents' 2014 income tax return filing status.

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Privacy

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Step 4: If you selected “*Already Completed*” it will prompt you to answer ‘Yes’ or ‘No’ to a series of questions. *Fig 1.4*

Fig 1.4

Help

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

Parent Tax Information

For 2014, have your parents completed their IRS income tax return or another tax return?
Already completed

For 2014, what is your parents' tax filing status according to their tax return?
Married-Filed Joint Return

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

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

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

Did you, the parents, 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 parents, 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 PIN and click **Link To IRS**.

Which parent are you?
Parent 1 (Father/Mother/Stepparent)

What is your (the parent's) PIN?
 [Apply For A PIN](#) [I Forgot/Don't Know My PIN](#)
LINK TO IRS

CHECK FOR ERRORS PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints
Parents Filed 2014 Income Tax Return?
Question 80
This question asks whether or not your **parents** have filed or will file a 2014 income tax return. If your parents are now married (even if they were not married in 2014) answer this question about them as a couple. If your parents are either not married, divorced, separated, or widowed, answer this question about the parent who is reporting financial information on this application.
Select the option that indicates your parents' 2014 income tax return filing status.

Answer the questions

***If you answered 'Yes' to any of the questions above, **you will not be able to utilize the IRS Data Retrieval Tool** at this time. Otherwise you will be prompted to enter your PIN and click on "LINK TO IRS".

Step 5: Once you click to Link to IRS you will receive a message that you are leaving FAFSA on the Web. *Fig 1.6*

Leaving *FAFSA on the Web*

You have entered answers to one or more income questions. *FAFSA on the Web* will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA.

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.

Fig 1.6

Step 6: Once on the IRS website, enter the requested information of the person listed *Fig 1.7*

Internal Revenue Service
United States Department of the Treasury

Log Out | Help

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 *	<input type="text" value="Joe"/>
Last Name *	<input type="text" value="Smith"/>
Social Security Number *	<input type="text" value="*** - ** - 6789"/>
Date of Birth *	<input type="text" value="01 / 04 / 1990"/>
Address * ?	<input type="text"/>
P.O. Box and/or Street Address	<input type="text"/>
Apt. Number (Required if it appears on your tax return)	<input type="text"/>
Country *	<input type="text" value="United States"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	<input type="text" value="Select One"/>
ZIP Code *	<input type="text"/>
Filing Status *	<input type="text" value="Select One"/>

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.

Fig 1.7

Step 7: Once the IRS validates your identification, your IRS tax information will display. Click 'Submit'. You will then be given the option to transfer your information by clicking "**Transfer Now**" which will then give you the response "*You have successfully transferred your 2014 tax information*".

***Click 'Next' and follow the same Step 3 to Step 7 for the student before going to Step 8

***The data that will be retrieved, if applicable, includes:

- Adjusted gross income
- Taxes paid
- Number of exemptions
- Education credits
- Untaxed portion of IRA distributions and pensions

***The following information will not be retrieved and must be manually added to the FAFSA if applicable:

- Earned income (for each father, mother, and/or student): listed in Box 1 on W-2 statements
- Self-employment income (Line 12 or 18 of your tax return. If negative, enter zero)
- Earned income from partnership (Form 1065: Box 14, Code A of Schedule K-1)
- Payments to tax-deferred pensions (Box 12a-d, Codes D, E, F, G, H and S on the W-2)
- Child support received or paid
- Other untaxed income such as Housing Allowance, worker's compensation, disability, etc.

Step 8: You are NOT DONE!!! Be sure once you are done with the IRS Data Retrieval that it takes you back to the FAFSA where you need to complete the sign and submit section by entering your PIN numbers to electronically sign your FAFSA. When you are finished you will receive a confirmation number and an Expected Family Contribution (EFC) number. (Fig 1.8)

Fig 1.8

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Help

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

Sign & 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**.

Are you a preparer?
 Yes No

Student Signature
Student's Social Security Number: XXX-XX-0010
Student's last name: Demoirs
Student's date of birth: 04/19/1992
What is your (the student's) PIN?

VIEW OR PRINT YOUR FAFSA INFORMATION

Are you a preparer?
 Yes No

Student Signature
Student's Social Security Number: XXX-XX-0010
Student's last name: Demoirs
Student's date of birth: 04/19/1992
What is your (the student's) PIN?

Scroll Down

***Scroll down to enter both student and parent PIN's, click 'Agree' to the Terms of Agreement for both student and parent and click 'Submit My FAFSA Now'.