

INSTRUCTIONS FOR THE IRS DATA RETRIEVAL TOOL

STUDENT

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 Tax Information

For 2013, have you completed your IRS income tax return or another tax return?

For 2013, what is your tax filing status according to your tax return?

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

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 11 weeks)?
 Yes No

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?
 [Apply For A PIN](#)

[LINK TO IRS](#) ← **LINK TO IRS**

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Under the **Financial Information** section there will be two questions asking, “For 2013, have you completed your IRS income tax return or another tax return?” and “For 2013, what is your tax filing status according to your tax return?”

- If you selected “will file” indicate your filing status and click next to continue filling out your FAFSA and be sure to sign and submit it. Remember, after you file your taxes you will need to go back into your FAFSA to make a correction and change it to already completed and use the data retrieval tool.
- If you selected “not going to file” click next and continue filling out your FAFSA and be sure to sign and submit it. You will also need to contact the Financial Aid office.
- If you selected “already completed” indicate your filing status, then there will be 3 questions that will pop up.
 - If you selected yes to “Did you file an amended tax return?” or “Did you file a Puerto Rico or foreign tax return?” You will need to click next and continue filling out your FAFSA and be sure to sign and submit it. You will also need to contact the Financial Aid office.
 - If you selected no to all of the questions, the **IRS Link** will pop up. (You may be required to type in your 4 digit pin before you can access the link) Once you get to the IRS page you will need to put the information **EXACTLY** how it is on your Tax Return. Then click submit and if the data is able to transfer a page will come up with your tax information. Check the box under transfer my tax information and then click **transfer now**. When you get back to the FAFSA website make sure that you **sign with your pin and submit your FAFSA**.



Parent <YYYY> Federal Income Tax Information

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

	My Tax Information	FAFSA Question Numbers
Tax Year	<2008>	
Name (s)	<Joe & Jane Smith>	
Social Security Number	<***-**-6789>	
Filing Status	<Married-Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question <##> on the FAFSA
Adjusted Gross Income	<\$126,721>	Question <##> on the FAFSA
Income Tax	<\$31,400>	Question <##> on the FAFSA
IRS Exemptions	<5>	Question <##> on the FAFSA
Education Credits	<\$2,500>	Question <##> on the FAFSA
IRA Deductions and Payments	<\$2,500>	Question <##> on the FAFSA
Tax-Exempt Interest Income	<\$2,500>	Question <##> on the FAFSA
Untaxed IRA Distributions	<-\$2,500>	Question <##> on the FAFSA
Untaxed Pensions	<-\$2,500>	Question <##> 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](#)

If you are unable to use the IRS Data Retrieval Tool please contact the Financial Aid Office.