

IRS Data Retrieval Tool for FAFSA

Available 2-3 weeks after electronically filing 2015 Federal Tax Return.
Certain exclusions apply. *If you are unable to use, please see option B.*

Step 1: Go to www.fafsa.gov and click “Login.”

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FAFSA™
Free Application for Federal Student Aid

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Get help paying for college

Submit a Free Application for Federal Student Aid (FAFSA)

New to the FAFSA?

Start A New FAFSA

Returning User?

- Make a correction
- Add a school
- View your Student Aid Report (SAR), and more...

Login

Step 2: Enter your FSA Username and Password and click “Next.”

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Home Help

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Login

Student Information

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

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.

Enter either your (the student's) FSA ID or personal information to log in to *FAFSA on the Web*.

Enter your (the student's) FSA ID **Enter the student's information**

Do not log in with the FSA ID if you are not the student.
[Create an FSA ID](#)

OR

FSA ID Username or Verified E-mail Address

[Forgot Username](#)

FSA ID Password

[Forgot Password](#)

NEXT

NEED HELP?

Help and Hints

Login Options

The FSA ID, which consists of a user-created username and password, replaced the PIN effective May, 2015. It allows users to electronically access personal information on Federal Student Aid Web sites as well as electronically sign a FAFSA.

Select one:

Enter your FSA ID (only the student should log in with an FSA ID).

Or

Enter the student's name, Social Security Number and date of birth. (You may have to enter your FSA ID later in the process).

STUDENT

Step 3: Click “Make FAFSA Corrections.”

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Home | Help | Welcome, Susan | Logout | SEARCH

My FAFSA

Welcome,

2017-2018 | 2016-2017

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).

Original Application
Submitted: 01/01/2015
Processed: 01/01/2015

Latest Correction
Submitted: 01/01/2015
Submitted By: Student
Processed: 01/01/2015

You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [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

FSA ID | Last Time, Date FSA ID Used: 5:18, 06/27/2015

FSA ID Status:
[User Account Management](#)
You can use your FSA ID to sign your FAFSA electronically or make corrections to your FAFSA.

📄 Create a shareable file with some of your student information.
[Learn More](#)

NEED HELP?

Step 4: Create a Save Key and click “Next.”

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Make Corrections to Your 2017-2018 FAFSA

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

Create a Save Key.
The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

Create a Save Key

Re-enter Save Key

NEXT

STUDENT

NEED HELP? **MY FAFSA**

Help and Hints

Create a Save Key

Enter the save key you created when you started this application or correction.

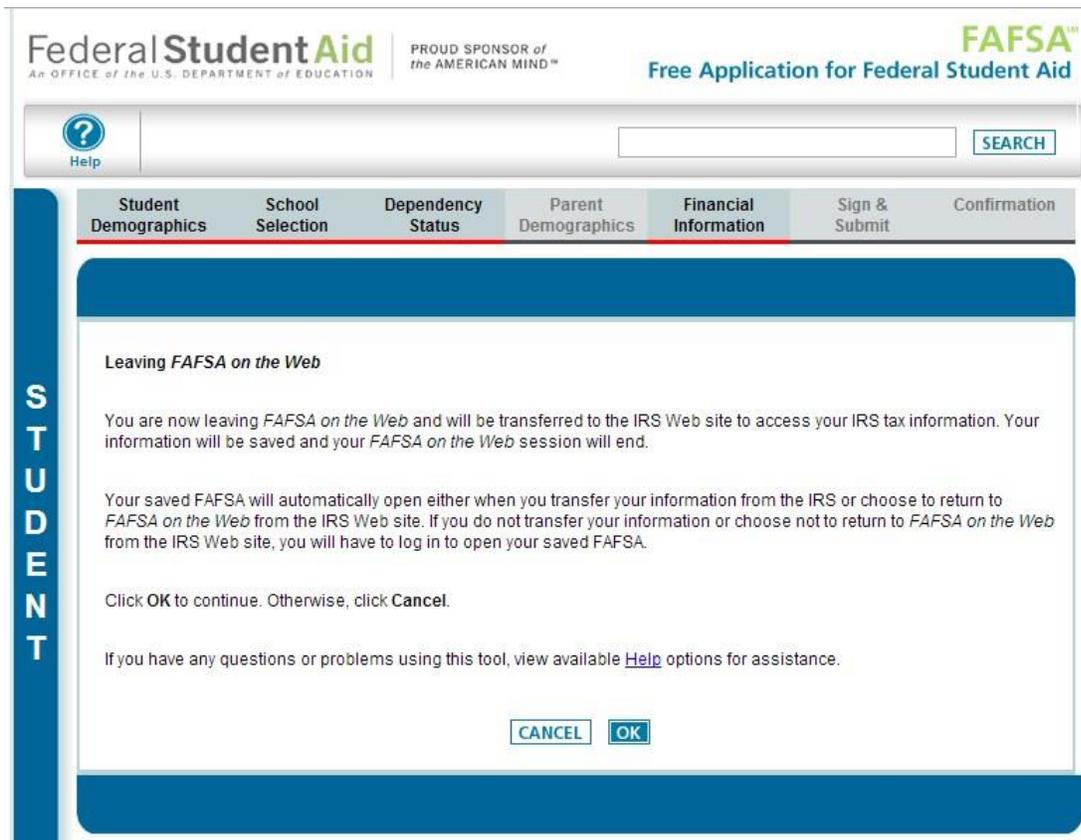
The save key is between 4 and 8 characters long. It can contain any combination of numbers and / or uppercase and lowercase letters. For example, the save key "Student2" is different than the save key "sTuDeNt2."

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

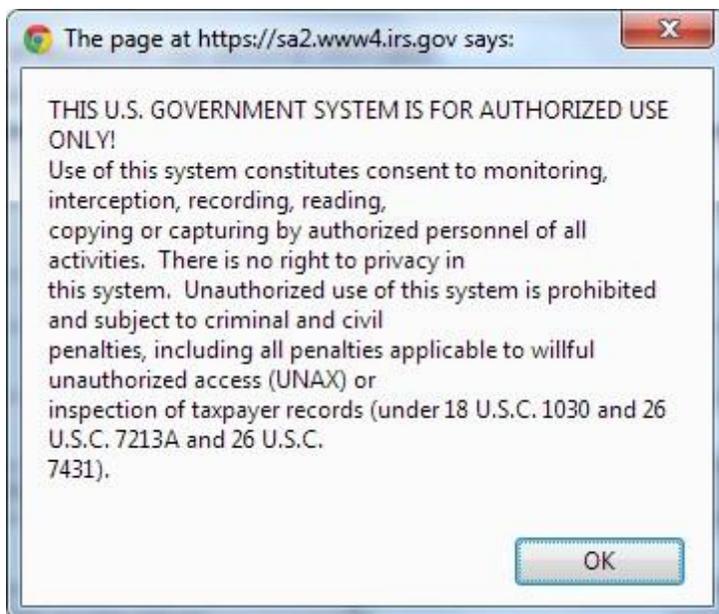
The screenshot shows the FAFSA application interface. At the top, it says "Federal Student Aid" and "FAFSA® Free Application for Federal Student Aid". The "Financial Information" tab is selected. The "Student Tax Information" section is highlighted, showing a success message: "Application was successfully saved." Below this, there are two questions: "For 2015, have you completed your IRS Income tax return or another tax return?" with a dropdown menu set to "Already completed", and "For 2015, what is your tax filing status according to your tax return?" with a dropdown menu set to "Single". There are three radio button questions: "Did you file a Form 1040X amended tax return?" (No selected), "Did you file a Puerto Rican or foreign tax return?" (No selected), and "Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?" (No selected). A red arrow points to a "LINK TO IRS" button. To the right, there is a "Help and Hints" box with text about electronic filing. At the bottom, there are navigation buttons: "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT".

Step 6: If you are eligible to use the IRS Data Retrieval Tool, you can now click on the LINK TO IRS button. If you are not eligible to use the IRS Data Retrieval Tool, you will need to order 2015 Tax Return Transcript(s), see option B

Step 7: Click “OK” to leave the FAFSA website and enter the IRS Data Retrieval Tool website.



Step 8: Click “OK” to accept the IRS Data Retrieval Tool terms of use.



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 from your 2015 Federal Income Tax Return.  Required fields *

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	*** - ** -
Date of Birth *	<input type="text"/> / <input type="text"/> / <input type="text"/>
Filing Status * 	Select One <input type="text"/>
Address – Must match your 2015 Federal Income Tax Return.  	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) 	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <input type="text"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One <input type="text"/>
ZIP Code *	<input type="text"/>

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.

Step 10: Review the information that the IRS has retrieved from your tax returns. Check the box to “Transfer My Tax Information into the FAFSA” and click “Transfer Now.” Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.

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.

	My Tax Information	FAFSA Question Numbers 
Tax Year	2015	
Name(s)		
Social Security Number	*** - ** -	
Filing Status		Question 34 on the FAFSA
Type of Tax Return Filed		Question 33 on the FAFSA
Adjusted Gross Income		Question 36 on the FAFSA
Income Earned From Work 		Question 39 on the FAFSA
Income Tax		Question 37 on the FAFSA
IRS Exemptions		Question 38 on the FAFSA
Education Credits		Question 44a on the FAFSA
IRA Deductions and Payments		Question 45b on the FAFSA
Tax-Exempt Interest Income		Question 45d on the FAFSA
Untaxed IRA Distributions 		Question 45e on the FAFSA
Untaxed Pensions 		Question 45f 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 

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 additional questions and click “Next.”

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Help [SEARCH]

STUDENT

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 1040

What was your adjusted gross income for 2015? This amount is found on IRS Form 1040-line 37.
 \$ 100.00 Transferred from the IRS

Your income earned from working (wages, salaries, tips, etc.) in 2015 was **transferred from the IRS**. This amount is the total of IRS Form 1040-lines 7+12+18.
 \$ 100.00

Did you file an IRS Schedule K-1 (Form 1065) for 2015?
 Yes No

As of today, are you a dislocated worker?
 Select

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints
Student's 2015 Income Earned from Work
Question 39
 If you are not married and use the IRS Data Retrieval Tool, the answer to this question will be pre-filled.
 If you are married and use the IRS Data Retrieval Tool, your and your spouse's total income earned from working is transferred from the IRS. You are required to enter your portion of the transferred amount.
 If you filed a 1040 tax return and use the IRS Data Retrieval Tool, tax information from IRS Schedule K-1 (Form 1065) is not transferred from the IRS. You are required to enter

Step 12: Continue to the “Sign & Submit” tab. Follow all of the instructions carefully to submit your FAFSA correction. Make sure the confirmation page appears after clicking the submit button.

Help SEARCH

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

Sign & Submit

Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a preparer?
 Yes No

Student Signature

Student's Social Security Number

Student's last name

Student's date of birth

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same

I, the student, agree to the terms outlined above.
 Agree Disagree

[SIGN](#)

[PREVIOUS](#) [SUBMIT MY FAFSA NOW](#)

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

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**.

B. Contact IRS to Request 2015 IRS Tax Return Transcript using one of the following:

1. Call 800-908-9946
2. Online at <http://www.irs.gov/Individuals/Get-Transcript>
- 3 Complete and submit form 1046-EZ to the IRS

IMPORTANT: To use **Get Transcript by Mail**, you need your [Social Security number \(SSN\)](#) or your [Individual Tax Identification Number \(ITIN\)](#), date of birth, and address from your latest tax return.