

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 either 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. There is also a search bar and language options for English and Español. A large blue banner reads 'Get help paying for college' and 'Submit a Free Application for Federal Student Aid (FAFSA)'. Below the banner is a photo of four diverse students. Underneath the photo are two columns: '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.

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, and a search bar. The main content area is titled 'Login' and contains a 'Student Information' form. The form has fields for 'The student's first name', 'The student's full last name', 'The student's Social Security Number', and 'The student's date of birth (mmddyyyy)'. There is a 'NEXT' button at the bottom right of the form. To the right of the form 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.' There is a 'More>>>' link at the bottom of the help section. A vertical 'STUDENT' label is on the left side of the form area.

***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 ‘Next’, then click on ‘Continue’. If you created a ‘Password’ (not your PIN), enter it here, if not, click next. Make sure you end up on the ‘Financial Information’ tab.

Step 3: You will be prompted to answer, “For 2012, have your parents completed their IRS income tax return or another tax return?”. In the drop down box select the appropriate option of the three. If you selected “*Already Completed*” it will prompt you to the next page. Otherwise, if you choose any of the other two options, then you are not able to use the IRS Data Retrieval. *Fig 1.3*

Fig 1.3

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

Parent Tax Information

Application was successfully saved.

For 2012, have your parents completed their 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
Parents Filed 2012 Income Tax Return?
Question 79
This question asks whether or not your parents have filed or will file a 2012 income tax return. If your parents are now married (even if they were not married in 2012), answer this question about them as a couple. If they are not married, answer this question about the parent who is reporting financial information on this application.
Select the option that indicates your parents' 2012 income tax return filing status:

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

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

Parent Tax Information

Application was successfully saved.

For 2012, have your parents completed their IRS income tax return or another tax return?

Already completed

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

Did either or both parents file as Married Filing Separately?
Yes No

Did either or both parents file as Head of Household?
Yes No

Did you, the parents, file an 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 8 weeks)?
Yes No

Answer Yes or No to all of these questions.

Help and Hints
Parents Filed 2012 Income Tax Return?
Question 79
This question asks whether or not your parents have filed or will file a 2012 income tax return. If your parents are now married (even if they were not married in 2012), answer this question about them as a couple. If they are not married, answer this question about the parent who is reporting financial information on this application.
Select the option that indicates your parents' 2012 income tax return filing status:

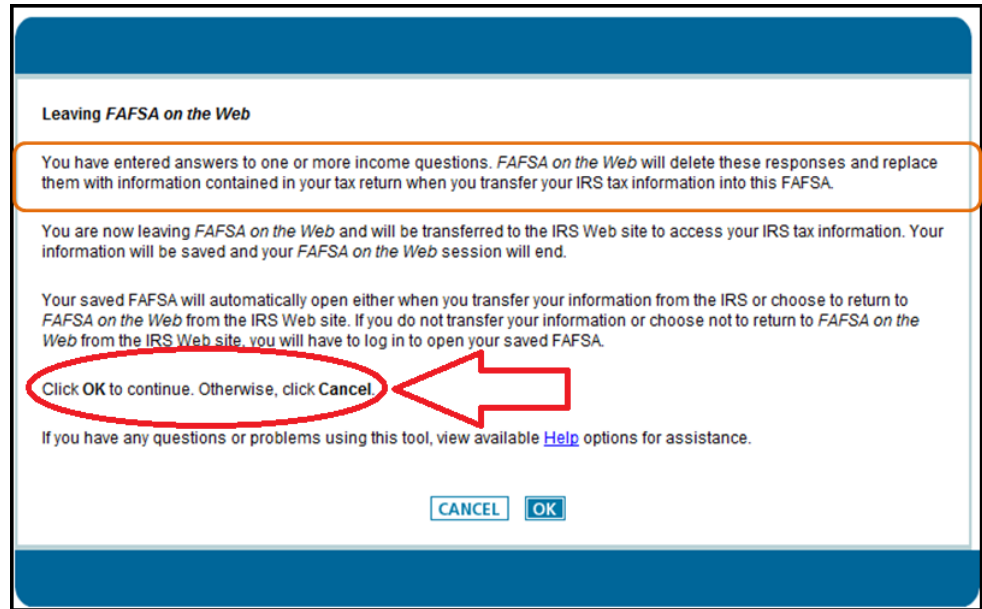
****If you answered 'Yes' to any of the questions above, you will not be able to utilize the IRS Data Retrieval Tool at this time. Otherwise you will be prompted to enter your PIN and link to IRS. Fig 5

Fig 5



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

Fig 1.6



Step 6: Once on the IRS website, enter the requested information of the person listed on the first line of the 2012 Federal 1040, 1040A, or 1040EZ. Fig 1.7

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

[Submit](#)

Step 7: Once the IRS validates your identification, your IRS tax information will display. 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 2012 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.