

# IRS DATA RETRIEVAL PROCESS

1. When you first log in, it brings you to this screen. Click on Make FAFSA Corrections.

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Welcome, Jack Logout

Home Contact Us Browse Help

**My FAFSA**

Welcome, Jack Smith

2012-2013 2011-2012

**Current Application Status: Processed Successfully**

Your application was processed successfully.  
You should review it for accuracy.

VIEW PROCESSED INFORMATION (PDF VERSION)

VIEW PROCESSED INFORMATION (HTML VERSION)

Original Application  
Submitted: 02/20/2012  
Processed: 02/21/2012

You can also:

- [Make FAFSA Corrections](#)

**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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You have not submitted the IRS Data unless you receive a confirmation number!

2. You will have to enter your password twice.

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Home Contact Us Browse Help

SEARCH

**Make Corrections to Your 2012-2013 FAFSA**

Form Approved OMB No. App. Exp. 12/31/2013

Create a password. Don't forget the password you create, because you will need it if you save your FAFSA and want to return to it later.

Password

Re-enter 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

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3. This screen has FAQ's. Click on the Financial Information button along the top.

The screenshot shows the FAFSA application interface. At the top, there is a navigation bar with the FAFSA logo and the text "Free Application for Federal Student Aid". Below this is a search bar and a "SEARCH" button. The main navigation menu includes tabs for "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Financial Information" tab is highlighted with a red underline and a red arrow pointing to it. The content area displays an "Introduction Page - 2012-2013 Correction" with instructions and several links: "Making corrections to a processed FAFSA", "How many steps does it take to complete?", "How can I get help correcting my FAFSA?", "Can I save my FAFSA if I can't finish it?", "Signing the FAFSA", and "FAFSA on the Web Security and Privacy". There are "NEXT" and "EXIT" buttons at the bottom of the content area. A vertical "STUDENT" label is on the left side. At the bottom, it says "Site Last Updated: Sunday, February 12, 2012" and "Download Adobe Reader".

4. It will prompt you on how to start the IRS Data Retrieval.

The screenshot shows the FAFSA application interface, specifically the "Student Financial Information" section. The navigation bar is the same as in the previous screenshot. The "Financial Information" tab is selected. The main content area is titled "Student Financial Information" and contains a message: "Application was successfully saved." Below this is a red oval highlighting a message: "You may be able to use the IRS Data Retrieval Tool if you filed your taxes. Change your answer to the first question on this page if you filed a 2011 tax return." The form includes several questions and input fields: "For 2011, have you completed your IRS income tax return or another tax return?" with a dropdown menu set to "Will file"; "What income tax return will you file for 2011?" with a dropdown menu set to "IRS 1040A or 1040EZ"; "What was your adjusted gross income for 2011?" with an "INCOME ESTIMATOR" button and a text input field set to "\$50,000.00"; "How much did you earn from working (wages, salaries, tips, etc.) in 2011?" with a text input field set to "\$50,000.00"; "How much did your spouse earn from working (wages, salaries, tips, etc.) in 2011?" with a text input field; "Were you a dislocated worker on the day you submitted your FAFSA?" with a dropdown menu set to "No"; and "In 2010 or 2011, did you receive benefits from any of the federal benefits programs listed below? Check all that apply or check None of the above." with checkboxes for "Supplemental Security Income (SSI)", "Food Stamps or Supplemental Nutrition Assistance Program (SNAP)", and "Free or Reduced Price Lunch". On the right side, there is a "Help and Hints" section titled "Student Filed 2011 Income Tax Return? Question 32" with instructions: "You must select the answer that describes your tax filing status:" and a list of options: "Already completed", "Will file", and "Not going to file". A vertical "STUDENT" label is on the left side.

5. After you change your filing status from “Will File” to “Already Completed,” it brings up the first IRS Data Retrieval Box.

START HERE GO FURTHER FEDERAL STUDENT AID FAFSA Free Application for Federal Student Aid

Contact Us Browse Help SEARCH

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

### Student Financial Information

Application was successfully saved.

For 2011, have you completed your IRS income tax return or another tax return?  Not completed  Already completed

You may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Check all that apply or check **None of the above**.

- I filed an amended tax return
- I filed a Puerto Rican or foreign tax return
- I recently filed my taxes
- None of the above

What income tax return did you file for 2011?

What was your adjusted gross income for 2011?  \$50,000.00

How much did you earn from working (wages, salaries, tips, etc.) in 2011? \$50,000.00

How much did your spouse earn from working (wages, salaries, tips, etc.) in 2011? \$ .00

Were you a dislocated worker on the day you submitted your FAFSA?

#### Help and Hints

##### Student Filed 2011 Income Tax Return? Question 32

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

- Already completed
- Will file
- Not going to file

6. Select “I recently filed my taxes” and click on View option to link to the IRS.

START HERE GO FURTHER FEDERAL STUDENT AID FAFSA Free Application for Federal Student Aid

Contact Us Browse Help SEARCH

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

### Student Financial Information

Application was successfully saved.

For 2011, have you completed your IRS income tax return or another tax return?  Not completed  Already completed

You may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Check all that apply or check **None of the above**.

- I filed an amended tax return
- I filed a Puerto Rican or foreign tax return
- I recently filed my taxes
- None of the above

If you filed your taxes electronically within the last 2 weeks or if you filed your taxes by mail within the last 8 weeks, your tax information may not be available yet from the IRS. You can determine if you should attempt to access your tax information from the IRS at this time. Keep in mind any [deadlines](#).  
[View option to link to the IRS](#)

What income tax return did you file for 2011?

What was your adjusted gross income for 2011?  \$50,000.00

How much did you earn from working (wages, salaries, tips, etc.) in 2011? \$50,000.00

#### Help and Hints

##### I recently filed my taxes

Under certain conditions, students are not eligible to use the IRS Data Retrieval Tool, which allows users to link to the IRS Web site and securely transfer IRS tax return information into their FAFSA. If you meet any of these conditions, you will not be presented with the option to link to the IRS.

Select the check boxes that describe your (and if married, your spouse's) tax filing status, or select **None of the Above**.

Select **My tax filing status is Married Filing Separately** if you are married, but you are not filing jointly.

7. After clicking on View option to link to the IRS, a link to the IRS will appear.

START HERE GO FURTHER FEDERAL STUDENT AID FAFSA Free Application for Federal Student Aid

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

**STUDENT**

**Student Financial Information**

Application was successfully saved.

For 2011, have you completed your IRS income tax return or another tax return?

You may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Check all that apply or check **None of the above**.

I filed an amended tax return

I filed a Puerto Rican or foreign tax return

I recently filed my taxes

None of the above

If you filed your taxes electronically within the last 2 weeks or if you filed your taxes by mail within the last 8 weeks, your tax information may not be available yet from the IRS. You can determine if you should attempt to access your tax information from the IRS at this time. Keep in mind any [deadlines](#).

[LINK TO IRS](#)

What income tax return did you file for 2011?

What was your adjusted gross income for 2011?   [INCOME ESTIMATOR](#)

**Help and Hints**

I recently filed my taxes

Under certain conditions, students are not eligible to use the IRS Data Retrieval Tool, which allows users to link to the IRS Web site and securely transfer IRS tax return information into their FAFSA. If you meet any of these conditions, you will not be presented with the option to link to the IRS.

Select the check boxes that describe your (and if married, your spouse's) tax filing status, or select **None of the Above**.

Select **My tax filing status is Married Filing Separately** if you are married, but you

8. It will then connect you to the IRS, which will pop up a new screen. This screen is just the warning screen. Click the "OK" box.

START HERE GO FURTHER FEDERAL STUDENT AID FAFSA Free Application for Federal Student Aid

Contact Us Browse Help SEARCH

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

**STUDENT**

**Leaving FAFSA on the Web**

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.

You have entered answers to one or more income questions. These answers will be overwritten when you transfer your IRS tax information into this FAFSA.

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, [Contact Us](#) for assistance.

[CANCEL](#) [OK](#)

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Privacy

9. The first IRS screen has you confirm your personal information and mailing address. The screen below is to confirm that you want the IRS Data transferred. Click the box for "Transfer My Tax Information into the FAFSA" and then click on Transfer Now.

IRS.gov [Return to FAFSA](#) | [Log Out](#) | [Help](#) [Español](#)

### Student 2011 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	2011	
Name(s)	Jack Smith	
Social Security Number	*** - ** - 1234	
Filing Status	Single	
Type of Tax Return Filed	1040EZ	Question 33 on the FAFSA
Adjusted Gross Income	\$5,500	Question 35 on the FAFSA
Income Earned From Work ?	\$52,500	Question 38 on the FAFSA
Income Tax	\$4,973	Question 36 on the FAFSA
IRS Exemptions	1	Question 37 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.

**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.

[Transfer Now ?](#) [Do Not Transfer ?](#)

[IRS Privacy Policy](#)

10. It then brings you back to the FAFSA page, confirming your information is transferred.

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Contact Us [Browse Help](#)  [SEARCH](#)

**STUDENT** **Financial Information** | [Sign & Submit](#) | [Confirmation](#)

#### Student Financial Information

**You have successfully transferred your 2011 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."

For 2011, have you completed your IRS income tax return or another tax return? [Already completed](#)

You may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Check all that apply or check **None of the above**.

I filed an amended tax return

I filed a Puerto Rican or foreign tax return

I recently filed my taxes

None of the above

You have already transferred your tax information from the IRS. [View option to link to the IRS](#)

**Transferred from the IRS**

What income tax return did you file for 2011?

**Transferred from the IRS**

What was your adjusted gross income for 2011? .00

How much did you earn from working (wages, salaries, tips, etc.) .00

#### Help and Hints

**Student Filed 2011 Income Tax Return? Question 32**

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

- Already completed
- Will file
- Not going to file

11. The last screen is to confirm that the transferred information is correct. (Part 1)

START HERE  
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Contact Us | Browse Help

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

**List of Changes**

**I** You corrected your FAFSA. Review the information on this page and click Next to sign and submit your corrections.

**S** Application was successfully saved.

This is a list of the FAFSA questions for which you corrected or confirmed your answers.  
Student ID: XXX-XX-1234 5M 01

[PRINT THIS PAGE](#)

**Student Demographics - No Change**

**School Selection - No Change** [ADD A SCHOOL](#)

**Dependency Status - No Change**

**Parent Demographics - No Change**

**Financial Information**

	Previous Response	Current Response	
32. For 2011, have you completed your IRS income tax return or another tax return?	WILL FILE	ALREADY COMPLETED	<a href="#">Edit</a>
33. What income tax return did you file for 2011?	IRS 1040A OR 1040EZ	Transferred from the IRS	<a href="#">Edit</a>

You have not submitted the IRS Data unless you receive a confirmation number!

12. Same screen, part 2

**Parent Demographics - No Change**

**Financial Information**

	Previous Response	Current Response	
32. For 2011, have you completed your IRS income tax return or another tax return?	WILL FILE	ALREADY COMPLETED	<a href="#">Edit</a>
33. What income tax return did you file for 2011?	IRS 1040A OR 1040EZ	Transferred from the IRS IRS 1040A OR 1040EZ	<a href="#">Edit</a>
35. What was your adjusted gross income for 2011?	\$50,000	Transferred from the IRS \$52,500	<a href="#">Edit</a>
36. Enter the amount of your income tax for 2011.	\$500	Transferred from the IRS \$4,973	<a href="#">Edit</a>
37. Enter your exemptions for 2011.	1	Transferred from the IRS 1	<a href="#">Edit</a>
43a. Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040A-line 31	\$0	Transferred from the IRS \$0	<a href="#">Edit</a>
44b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040A-line 17	\$0	Transferred from the IRS \$0	<a href="#">Edit</a>
44d. Tax exempt interest income from IRS Form 1040A-line 8b	\$0	Transferred from the IRS \$0	<a href="#">Edit</a>
44e. Untaxed portions of IRA distributions from IRS Form 1040A-lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here	\$0	Transferred from the IRS \$0	<a href="#">Edit</a>
44f. Untaxed portions of pensions from IRS Form 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here	\$0	Transferred from the IRS \$0	<a href="#">Edit</a>

[PREVIOUS](#) [NEXT](#)

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

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After clicking on next you will need to agree to the terms and sign it as usual. (signature page not printed here).

Repeat for student and parent. The parent will need to sign for their corrections using their own PIN #.