

# USING THE IRS DATA RETRIEVAL TOOL

GO TO [WWW.FAFSA.GOV](http://WWW.FAFSA.GOV)

The screenshot shows the FAFSA website homepage. At the top, it says "Federal Student Aid" and "PROUD SPONSOR of the AMERICAN MIND". Below that is the "Free Application for Federal Student Aid" header. A navigation bar includes links for Home, About Us, FSA ID, StudentAid.gov, and Help, along with 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 diverse college students. Two main sections are visible: "New to the FAFSA?" with a "Start A New FAFSA" button, and "Returning User?" with a list of actions (Make a correction, Add a school, View your Student Aid Report (SAR), and more...) and a "Login" button. A green arrow points from a box on the right to the "Login" button. Below these sections are "Deadlines", "School Code Search", "FAFSA Filing Options", "Announcements", and "Thinking About College?" sections.

Click  
Login

# LOG IN WITH FSA ID

Enter your FSA ID  
Username or Verified  
E-mail Address

Enter your FSA ID  
Password and click  
Next

The screenshot shows the Federal Student Aid login interface. At the top, it features the 'Federal Student Aid' logo, the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION', 'PROUD SPONSOR of the AMERICAN MIND®', and the 'FAFSA Free Application for Federal Student Aid' logo. A navigation bar includes 'Home' and 'Help' icons, a search box, and a 'SEARCH' button. The main content area is titled 'Login' and contains 'Student Information' and a 'Form Approved' stamp. It provides instructions for logging in and offers two options: 'Enter your (the student's) FSA ID' and 'Enter the student's information'. The first option includes a warning not to log in if not the student and a link to 'Create an FSA ID'. Below are input fields for 'FSA ID Username or Verified E-mail Address' and 'FSA ID Password', with links for 'Forgot Username' and 'Forgot Password'. A 'NEXT' button is at the bottom right. A 'NEED HELP?' button is at the bottom left. A 'STUDENT' sidebar is on the left. A 'Help and Hints' sidebar on the right details 'Login Options' and explains the FSA ID process. Two green arrows point from the left-side text boxes to the respective input fields.

Federal Student Aid  
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FAFSA  
Free Application for Federal Student Aid

Home Help

SEARCH

### Login

**Student Information**

Form Approved  
OMB No. 1845-0001  
App. Exp. 12/31/2017

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

OR

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

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).

Site Last Updated: Sunday, January 24, 2016

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Privacy

# MY FAFSA

Be sure to  
select the  
correct aid  
year

Select Make  
FAFSA  
Corrections

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FAFSA  
Free Application for Federal Student Aid

Welcome, Heather Logout

Home Help

SEARCH

### My FAFSA

Welcome, [REDACTED]

2016-2017 2015-2016

**Current Application Status: Processed Successfully**

Congratulations, your FAFSA was successfully processed.

**Original Application**  
Submitted: 02/22/2016  
Processed: 02/23/2016

**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).

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

**FSA ID** Last Time, Date FSA ID Used: 1:29, 05/26/2016

**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?**

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Most Updated: Sunday, January 24, 2016

# CREATE A SAVE KEY

Save key must be between 4 to 8 characters and any combination of numbers/letters

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FAFSA  
Free Application for Federal Student Aid

Home Help

SEARCH

**STUDENT**

**Make Corrections to Your 2016-2017 FAFSA**

Form Approved  
OMB No. 1845-0001  
App. Exp. 12/31/2017

**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**

**NEED HELP?** **MY FAFSA**

**Help and Hints**  
Create a Save Key

You must create a save key. The save key allows you to return to an application or correction later if you need to stop and save your work. It also allows you to share access to your application or correction if your parent needs to add information or sign.

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

Try to choose a save key that you can remember but that would be hard for

Site Last Updated: Sunday, January 24, 2016

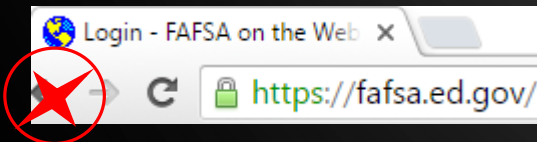
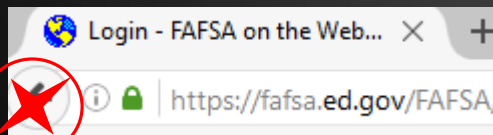
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Privacy

# INTRODUCTION PAGE - CORRECTION

Always use the Next and Previous buttons within the FAFSA

Never use the "Back" button on your browser for FAFSA

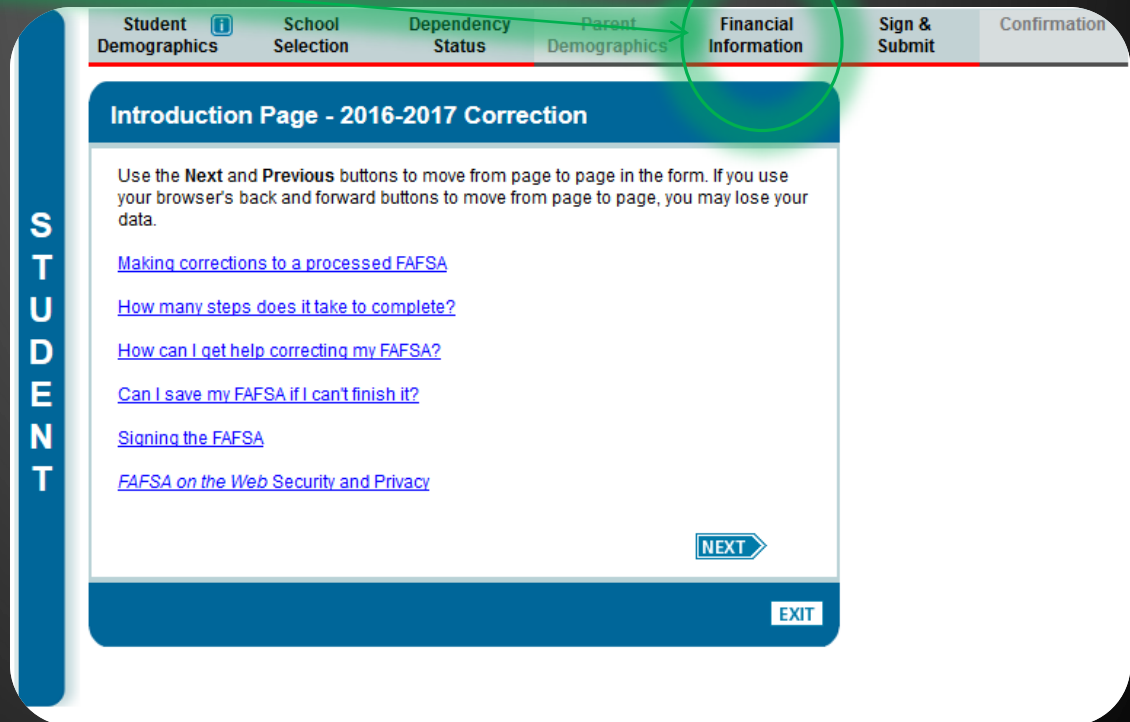


A screenshot of the FAFSA website's introduction page for corrections. The page header includes the Federal Student Aid logo, the text 'PROUD SPONSOR of the AMERICAN MIND', and the FAFSA logo with the text 'Free Application for Federal Student Aid'. A navigation menu contains tabs for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign &amp; Submit', and 'Confirmation'. The main content area is titled 'Introduction Page - 2016-2017 Correction' and contains instructions: 'Use the Next and Previous buttons to move from page to page in the form. If you use your browser's back and forward buttons to move from page to page, you may lose your data.' Below this are several blue hyperlinks: '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'. On the right side, there is a large blue 'NEXT' button with a right-pointing arrow, which is circled in green, and a smaller 'EXIT' button below it. A vertical 'STUDENT' label is on the left side of the main content area. At the bottom, it says 'Site Last Updated: Sunday, January 24, 2016' and 'Download Adobe Reader'.



# SELECT FINANCIAL INFORMATION

To skip to the  
IRS Data  
Retrieval Tool,  
select Financial  
Information  
from the menu



The screenshot shows the FAFSA application process. The navigation menu at the top includes: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information (highlighted with a green circle and a green arrow), Sign & Submit, and Confirmation. The main content area is titled "Introduction Page - 2016-2017 Correction" and contains the following text:

Use the **Next** and **Previous** buttons to move from page to page in the form. If you use your browser's back and forward buttons to move from page to page, you may lose your data.

[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](#)

[FAFSA on the Web Security and Privacy](#)

At the bottom right of the content area, there are two buttons: **NEXT** and **EXIT**.

# TO TRANSFER THE DATA...

Important: You must select "Already Completed"

Select your tax filing status

Important: If you answer Yes to any of these questions, you will not be able to use the IRS Link

The screenshot shows the 'Student Financial Information' section of a FAFSA form. At the top, there are tabs for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'Student' tab is active, and the page title is 'STUDENT'. A green box highlights a message: 'Application was successfully saved.' Below this, there are two dropdown menus: 'For 2015, have you completed your IRS income tax return or another tax return?' with 'Already completed' selected, and 'For 2015, what is your tax filing status according to your tax return?' with 'Single' selected. A section with a grid icon asks: 'To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):' followed by three questions, each with 'Yes' and 'No' radio buttons. A red box highlights the 'No' options for all three questions. Below the questions, a text box states: 'Based on your response, we recommend that you 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.' At the bottom of this box is a 'LINK TO IRS' button. On the right side, there is a 'Help and Hints' section with a scrollable area containing text about tax filing deadlines and the IRS Data Retrieval Tool. Green arrows point from the text boxes on the left to the 'Already completed' dropdown, the 'Single' dropdown, and the 'No' radio buttons. A red arrow points from the red text box to the 'No' radio buttons.

# SELECT LINK TO IRS

After you've answered the tax status and following questions; click "Link to IRS"

**STUDENT**

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

### Student Financial Information

Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?

For 2015, what is your tax filing status according to your tax return?

**To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):**

Did you file a Form 1040X 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. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

**LINK TO IRS**

### Help and Hints

weeks (or by mail in the last 11 weeks)?

If you filed your taxes electronically within the last three weeks, or by mail within the last eleven weeks, select **Yes**; otherwise, select **No**.

If you filed your taxes within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#); however, if you are not able to transfer your tax return information into your FAFSA at this time, you can try again in a week or two or you can manually enter your tax return information.

LINK TO IRS



# INFORMATION PAGE

Your FAFSA data will be saved up to this point; click OK

**S**  
**T**  
**U**  
**D**  
**E**  
**N**  
**T**

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

### 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 FAFSA information will be saved.

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.

CANCEL

OK

CANCEL

OK

# USE OF GOVERNMENT SITE

Read the IRS Site warning and  
then click OK

**THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!**

Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

OK

# FILL IN MISSING INFORMATION

Fill in any missing information; street address, city, state and zip code

Return to FAFSA | Log Out | Help

Español

## 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 *	*** - ** - 1234
Date of Birth *	<input type="text"/>
Filing Status * <a href="#">?</a>	Single <input type="text"/>
Address - Must match your 2015 Federal Income Tax Return. <a href="#">?</a>	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) <a href="#">?</a>	<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.

[Return to FAFSA](#) [Submit](#)

[IRS Privacy Policy](#)

# MATCH THE ADDRESS! AND CLICK SUBMIT!

You must match the address on your most recent tax return!

Click  
Submit!

Return to FAFSA | Log Out | Help

 IRS.gov Español

### 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 *	A
Last Name *	Student
Social Security Number *	*** - ** - ****
Date of Birth *	01 / 02 / 1983
Filing Status * <a href="#">?</a>	Single <input type="text"/>
Address - Must match your 2015 Federal Income Tax Return. <a href="#">?</a>	
Street Address *	123 Main St.
P.O. Box (Required if entered on your tax return) <a href="#">?</a>	<input type="text"/>
Apt. Number (Required if entered on your tax return)	4 <input type="text"/>
Country *	United States <input type="text"/>
City, Town or Post Office *	Barstow
State/U.S. Territory *	California (CA) <input type="text"/>
ZIP Code *	92311 <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.

[IRS Privacy Policy](#)

# TRANSFER THE DATA...

If the link was successful, you'll see your IRS Tax data on the site

Select the check box next to "Transfer My Tax Information into the FAFSA"

Click Transfer Now

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

### 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 <a href="#">?</a>
Tax Year	2015	
Name(s)	████████████████████	
Social Security Number	*** - ** - ████	
Filing Status	Single	Question 34 on the FAFSA
Type of Tax Return Filed	1040A	Question 33 on the FAFSA
Adjusted Gross Income	\$28,172	Question 36 on the FAFSA
Income Earned From Work <a href="#">?</a>	\$29,613	Question 39 on the FAFSA
Income Tax	\$2,188	Question 37 on the FAFSA
IRS Exemptions	1	Question 38 on the FAFSA
Education Credits	\$31	Question 44a on the FAFSA
IRA Deductions and Payments	\$0	Question 45b on the FAFSA
Tax-Exempt Interest Income	\$0	Question 45d on the FAFSA
Untaxed IRA Distributions <a href="#">?</a>	\$0	Question 45e on the FAFSA
Untaxed Pensions <a href="#">?</a>	\$0	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 \[?\]\(#\)](#)

[IRS Privacy Policy](#)



# CHECK THE INFORMATION

You'll see in bold  
"Transferred from  
the IRS" for  
several income  
questions; do not  
change these  
answers!

Student Demographics | School Selection | Dependency Status | Parent Demographics | Financial Information

### Student Financial Information

**STUDENT**

You're almost done. You transferred your IRS tax information, and questions that were populated are marked with "Transferred from the IRS." To finish, you must sign and submit this application and receive a confirmation page.

For 2015, have you completed your IRS income tax return or another tax return? **Already completed**

For 2015, what is your tax filing status according to your tax return? **Transferred from the IRS** Single

Enter the amount of your income tax for 2015. This amount is found on IRS Form 1040A-lines (28 minus line 36) or 1040EZ-line 10. **Transferred from the IRS** \$ 2,188.00

Enter your exemptions for 2015. This amount is found on IRS Form 1040A-line 6d or 1040EZ-see Help & Hints. **Transferred from the IRS** 1

# SIGN AND SUBMIT!

At the bottom of the page click “Check for Errors” or “Next”

Do you want to skip questions about your assets? Yes ▾

On the day you submitted your FAFSA, what was your total current balance of cash, savings, and checking accounts? \$  .00

On the day you submitted your FAFSA, what was the net worth of your investments, including real estate (not your home)? \$  .00

On the day you submitted your FAFSA, what was the net worth of your current businesses and/or investment farms? \$  .00

**CHECK FOR ERRORS** PREVIOUS **NEXT**

NEED HELP? SAVE CLEAR ALL DATA EXIT

NEED HELP? SAVE CLEAR ALL DATA EXIT

We are almost done...

# SIGN AND SUBMIT!

Be sure to click  
“Agree” and then  
click “Submit My  
FAFSA Now”

The screenshot shows the FAFSA 'Sign & Submit' page. At the top, there are navigation tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Sign & Submit' tab is active. Below the tabs, there is a 'Sign & Submit' header and a 'VIEW OR PRINT YOUR FAFSA INFORMATION' link. The 'Student Signature' section includes fields for the student's Social Security Number, last name, and date of birth, all of which are redacted with black bars. Below these fields is a 'READ BEFORE PROCEEDING' section containing a scrollable list of terms and conditions. The first four items are: 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, and 4. will notify your school if you default on a federal student loan, and I, the student, agree to the terms outlined above. Below the list are two radio buttons: 'Agree' (which is selected and circled in green) and 'Disagree'. At the bottom of the page, there are several buttons: 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'EXIT', 'PREVIOUS', and 'SUBMIT MY FAFSA NOW'. The 'PREVIOUS' and 'SUBMIT MY FAFSA NOW' buttons are circled in green.

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

### Sign & Submit

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

#### Student Signature

Student's Social Security Number [REDACTED]  
Student's last name [REDACTED]  
Student's date of birth [REDACTED]

#### 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

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

Agree  Disagree

[SIGN](#)

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

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

### Help and Hints

#### Terms of Agreement - Student

In order to submit your FAFSA, you must review the Terms of Agreement and select Agree.

[More>>>](#)