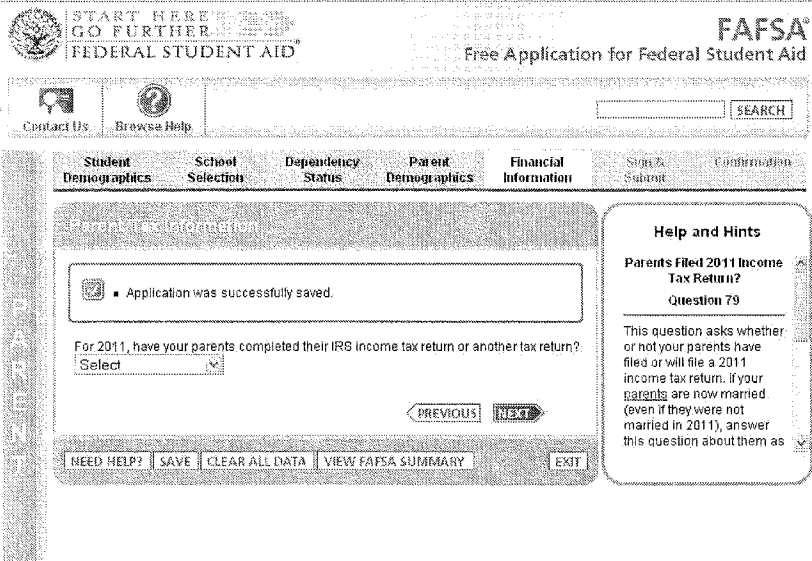


### Step-by-Step Instructions for Using the IRS Data Retrieval Tool on the FAFSA

To use the IRS data Retrieval Tool you must first file your tax return and wait 1 – 2 weeks if you file electronically, or 6 – 8 weeks if you mail in your returns.

After that time period, log back into the FAFSA. Both you and your parent(s) (if applicable) will need to go to your separate financial information sections (question 32 for students and question 79 for parents).

1. When you get to the step for “student/parent tax information” you will be prompted to answer whether you have completed your tax return.



The screenshot shows the FAFSA website interface. At the top, it says "START HERE GO FURTHER FEDERAL STUDENT AID" and "FAFSA Free Application for Federal Student Aid". There are navigation tabs for "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "SGLA Status", and "Confirmation". The "Parent Demographics" tab is selected. A message box says "Application was successfully saved." Below that, the question is "For 2011, have your parents completed their IRS income tax return or another tax return?" with a dropdown menu set to "Select". There are "PREVIOUS" and "NEXT" buttons. At the bottom, there are buttons for "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT". A "Help and Hints" box on the right explains the question: "Parents Filed 2011 Income Tax Return? Question 79. This question asks whether or not your parents have filed or will file a 2011 income tax return. If your parents are now married (even if they were not married in 2011), answer this question about them as..."

Use the drop-down menu to indicate that you/your parent’s IRS income tax return have been “already completed.”

2. Once you select this option, a box will appear letting you know that some filers are excluded from using the IRS Data Retrieval Tool.

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 Continue

Application was successfully saved.

For 2011, 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.

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

You, the parents, filed as Married Filing Separately

You, the parents, filed as Head of Household

You, the parents, filed an amended tax return

You, the parents, filed a Puerto Rican or foreign tax return

You, the parents, recently filed taxes

**Help and Hints**  
Parents Filed 2011 Income Tax Return?  
Question 79

This question asks whether or not your parents have filed or will file a 2011 income tax return. If your parents are now married (even if they were not married in 2011), answer this question about them as

You or your parents will be excluded from using the IRS Data Retrieval option if you indicate that any of the following apply:

- Your marital status changed after December 31, 2011
- You or they filed “married filing separately”
- You or they indicated “married” on the FAFSA but filed “head of household” on the tax return
- You or they filed an amended return
- You or they filed a foreign tax return

You may later be required to request a paper tax transcript from the IRS.

You will be offered to use the IRS Data Retrieval option if you report that “none of the above” exclusion criteria apply to you.

3. Another box will then appear prompting you to select your status (Student/Mother/Father/Step-Parent) and enter your PIN. Immediately after entering your PIN, click the “link to IRS” button.

For 2011, have your parents complete their 2010 income tax return or amended 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.**

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

You, the parents, filed as Married Filing Separately

You, the parents, filed as Head of Household

You, the parents, filed an amended tax return

You, the parents, filed a Puerto Rican or foreign tax return

You, the parents, recently filed taxes

None of the above

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA.

Enter your PIN and click **Link To IRS**.

Which parent are you?  
Select

What is your PIN?  
 [Apply For A PIN](#)  
 [I Forgot/Don't Know My PIN](#)

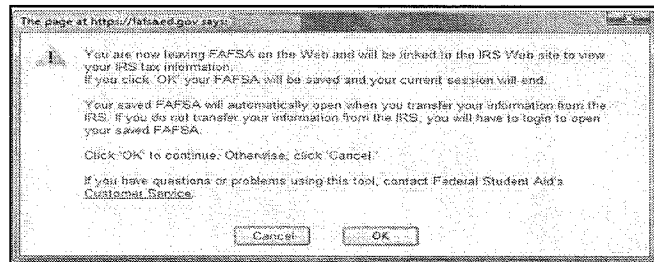
PREVIOUS NEXT

**Help and Hints**

**None of the above**

Under certain conditions, parents 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.

- If eligible to use the tool, you will be transferred to the IRS Website. You will then be notified you that you are leaving the FAFSA website and entering the IRS website to complete the transfer of your tax information. Click ok.



- On the IRS Web site, you will be prompted to enter information as it appears on your tax return. It is important that you complete this section exactly as it appears on your tax return or your information may not match with IRS records and the data retrieval may not go through.

**Internal Revenue Service**  
United States Department of the Treasury

063 Web Page - Input Shared Secrets

**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 **Federal Income Tax Return**.

First Name*	Joe
Last Name*	Smith
Social Security Number*	***-**-0789
Date of Birth*	01 / 04 / 1990
Address* P.O. Box 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

[Print](#)

6. Once the IRS has authenticated your identity, your IRS tax information will display. You may then choose to transfer your information from the IRS into your FAFSA by checking the "Transfer My Tax Information into the FAFSA" and clicking "Transfer Now" button (see below).

**IRS.gov**

[Return to FAFSA](#) | [Log Out](#) | [Help](#)

**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		
Name (s)	~Joe & Jane	
Social Security Number	~***-**-8789	
Filing Status	~Married - Filed Joint Return	
Type of Tax Return Filed	~1040	Questions 48B on the FAFSA
Adjusted Gross Income	~\$126,721	Questions 48B on the FAFSA
Income Tax	~\$31,400	Questions 48B on the FAFSA
IRS Exemptions	~5	Questions 48B on the FAFSA
Education Credits	~\$2,500	Questions 48B on the FAFSA
IRA Deductions and Payments	~\$2,500	Questions 48B on the FAFSA
Tax-Exempt Interest Income	~\$2,500	Questions 48B on the FAFSA
Untaxed IRA Distributions	~\$2,500	Questions 48B on the FAFSA
Untaxed Pensions	~\$2,500	Questions 48B 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](#)

After you have transferred your data, you will be returned to the FAFSA website to finish your application. Make sure not to change any of the financial data that was imported from the IRS Website. Remember that both you and your parents (if applicable) will need to go through a separate authentication process when filling out the Financial Information sections of the FAFSA.

7. To submit your updated FAFSA containing your/your parent's IRS data information you must click "submit my FAFSA now."

The screenshot shows a web browser window titled "Sign & Submit - FAFSA on the Web - Federal Student Aid - Mozilla Firefox". The address bar shows the URL "https://fafsademotest.ed.gov/FAFSA/app/fafsa?execution=e1s21". The page content is divided into two main sections: "Sign & Submit" and "Help and Hints".

**Sign & Submit**

Application was successfully saved.

**VIEW OR PRINT YOUR FAFSA INFORMATION**

Are you a preparer?  
 Yes  No

How do you (the student) want to provide your signature?  
 Sign Electronically With My PIN (Fastest) [Read: For A PIN](#)  
 Print A Signature Page  
 Submit Without Signatures

**READ BEFORE PROCEEDING**

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 period of time.

By signing this application electronically using your Federal Student Aid PIN or by

Terms of Agreement - Student  
 Agree  Disagree

**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**.