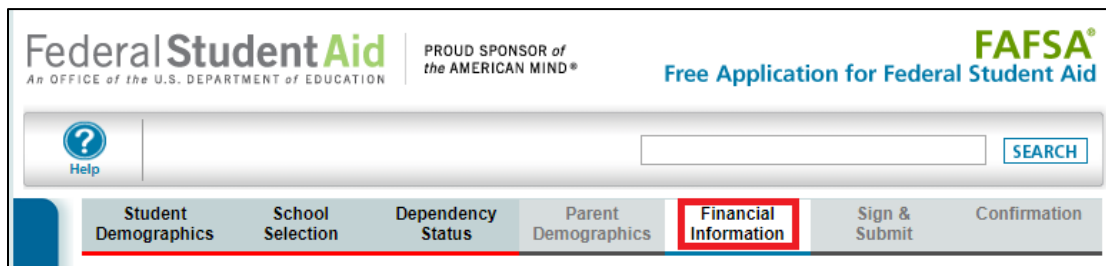


FAFSA IRS Data Retrieval

Step 1:

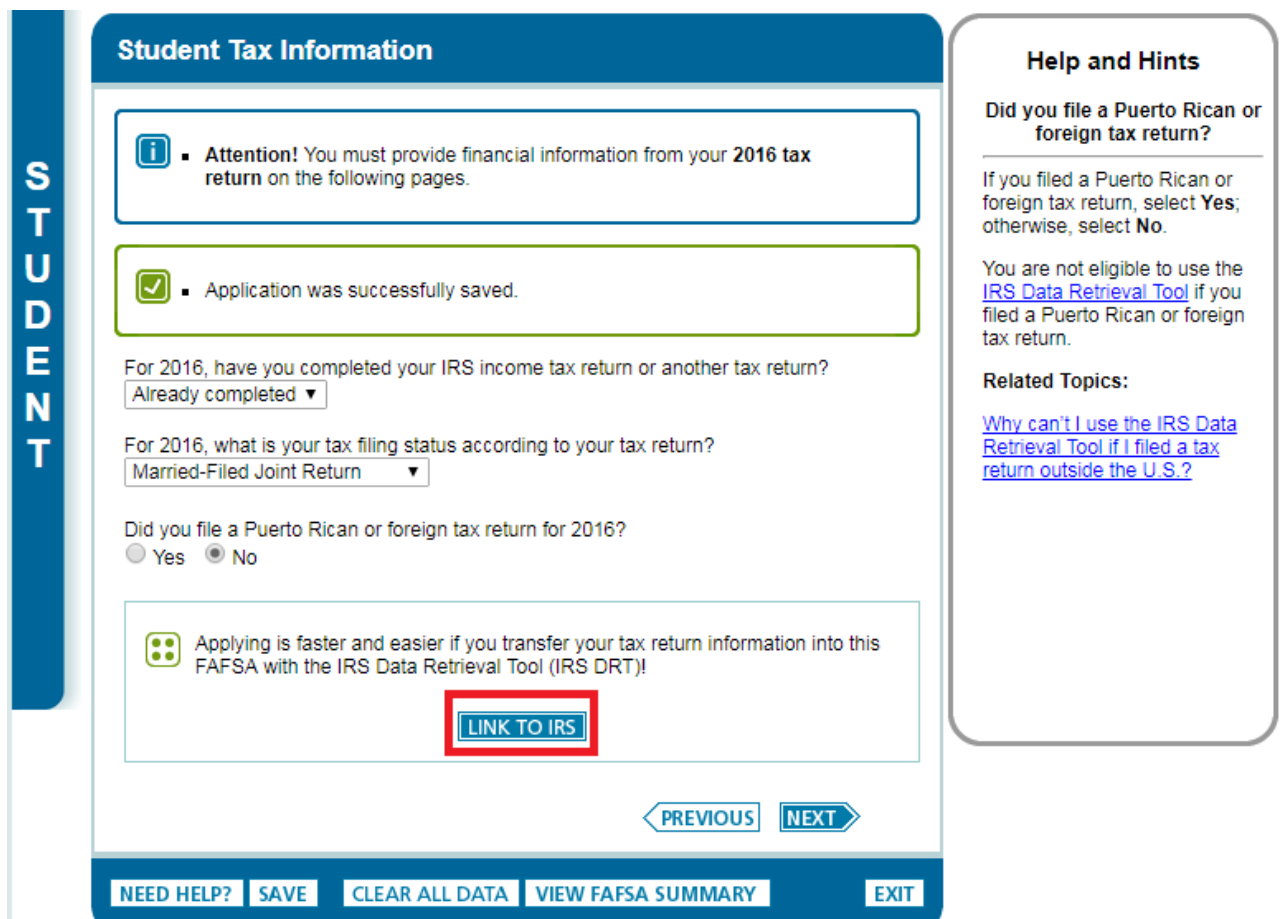
- Sign into the FAFSA and on the homepage select that you wish to "Make A Correction to an Existing FAFSA." Select the appropriate year.
- Once you are inside the FAFSA, select "Financial Information" on the menu bar. (Figure 1-1)



The screenshot shows the FAFSA homepage. At the top, it says "Federal Student Aid" and "FAFSA®". Below this is a navigation bar with several tabs: "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Financial Information" tab is highlighted with a red border. To the left of the tabs is a "Help" button with a question mark icon. To the right is a search bar with a "SEARCH" button.

Figure 1-1


- On the Financial Information page, answer the IRS Data Retrieval Tool questions appropriately. If the IRS determines you are eligible, you can perform the Data Retrieval. Click on the "Link to IRS" button. (Figure 1-2)



The screenshot shows the "Student Tax Information" page. On the left, there is a vertical blue bar with the word "STUDENT" in white. The main content area has a blue header "Student Tax Information". Below the header, there are two boxes: the first contains an information icon and text about providing 2016 tax return information; the second contains a checkmark icon and text "Application was successfully saved." Below these boxes are three questions with dropdown menus or radio buttons: "For 2016, have you completed your IRS income tax return or another tax return?" (dropdown: "Already completed"), "For 2016, what is your tax filing status according to your tax return?" (dropdown: "Married-Filed Joint Return"), and "Did you file a Puerto Rican or foreign tax return for 2016?" (radio buttons: "Yes", "No"). Below the questions is a box with a grid icon and text about using the IRS Data Retrieval Tool (IRS DRT). At the bottom of this box is a "LINK TO IRS" button with a red border. At the bottom of the page are navigation buttons: "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT". On the right side, there is a "Help and Hints" section with text about filing a Puerto Rican or foreign tax return and a "Related Topics" section with links to "Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.?"

Figure 1-2

- You will be taken to a page that will inform you that you will be leaving the FAFSA. Click “Proceed to IRS Site”. (Figure 1-3)



Help

STUDENT

Student Demographics

School Selection

Dependency Status

Parent Demographics

Financial Information

Sign & Submit

Confirmation

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 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.

For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.

Click **Proceed to IRS Site** to continue. Otherwise, click **Skip IRS Transfer**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

Figure 1 - 3

Step 2:

- Click "Ok" to agree to the authorized use page. (Figure 2-1)


sa.www4.irs.gov says:

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

Figure 2-1

- Fill in the required information and click "Submit." (Figure 2-2)



[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 20XX Federal Income Tax Return. [?](#) Required fields *

First Name *	John
Last Name *	Doe
Social Security Number *	*** - ** - xxxx
Date of Birth *	10 / 14 / 1970
Filing Status * ?	Married-Filed Joint Return ▾
Address - Must match your 20XX Federal Income Tax Return. ?	
Street Address *	1234 Sample Street
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	103
Country *	United States ▾
City, Town or Post Office *	Sample City
State/U.S. Territory *	California (CA) ▾
ZIP Code *	91321

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

Figure 2-2

- Continued below....

- Verify the information you entered, select "Transfer My Tax Information into the FAFSA" and click "Transfer Now". (Figure 2-3)


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

Español

20XX Federal Income Tax Information

John A & Jane A Doe


Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.


For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:


Tax Year	Type of Return Filed	Untaxed Pensions
Name(s)	Adjusted Gross Income	Untaxed IRA Distributions
Social Security Number	Income Earned from Work	Tax-exempt Interest Income
Filing Status	Income Tax	IRA Deductions and Payments
IRS Exemptions	Education Credits	Status of Amended Returns Received


Refer to your tax records if you have a question about the values you reported.

 Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA Form 

☐ The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.

Transfer Now 

Do Not Transfer My Tax Information and Return to the FAFSA Form 

☐ 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 form.


Do Not Transfer 

Figure 2-3

- Continued below....

- You will receive confirmation that your tax information imported into the FAFSA. (Figure 2-4)

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

Student Financial Information

☒ You have successfully transferred your 20XX 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."

Help and Hints

Student's Type of 20XX Tax Form Used
Question 33

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified

Figure 2-4

Step 3:

- You will be directed back to the FAFSA. It is important that you **do not change the financial information that was imported from the IRS**. On the top menu bar, click "Sign & Submit". (Figure 3-1)

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

Figure 3-1

- Under the "Sign & Submit" page, you will be notified that you have made changes and that your application was saved (Figure 3-2). Click "Next" at the bottom of the page. (Figure 3-3)

List of Changes

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

☒ Application was successfully saved.

Figure 3-2

PREVIOUS NEXT

Figure 3-3

- In order for TMU to receive your updated FAFSA you will need to "Sign & Submit" your FAFSA. Verify your information, read the terms, agree to the terms, click "sign" if you agree, and then click "Submit My FAFSA Now". (Figure 3-4)

Sign & Submit

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Student Signature

Student's Social Security Number: XXX-XX-XXXX

Student's last name: DOE

Student's date of birth: XX/XX/XXXX

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 EXIT

Site Last Updated: Sunday, January 24, 2016 [Download Adobe Reader](#)

[Privacy](#)

Figure 3-4

You are finished!!!

Notes:

- Your FAFSA may take 3-5 days to arrive at TMU.
- Once we receive your FAFSA we may contact you if we determine that additional documentation is needed.
- If you are having trouble logging into the IRS website to transfer your IRS information, you must contact the IRS to resolve your issue. The Master's University Office of Financial Aid cannot provide technical assistance for this website.
- If you are still having issues you may call the IRS to request a tax return transcript. Please visit the instructions on our verification page for details.