

# How to use the IRS Data Retrieval Tool

Data is available within **3 weeks of electronically filing your taxes** or **11 weeks of filing a paper tax return**. These instructions assume you have already filed your 2016-2017 FAFSA.



If you have filed an Amended Return, you are required to submit your **signed 1040X form**. You will also need to submit signed copies of your 2015 Tax Return OR your Tax Return Transcript to the Financial Aid Office. You cannot use the online Data Retrieval Tool.

You must submit a copy of your tax return transcript if...

- You have filed an extension
- You have filed a foreign tax return
- You are married filing separately

1. Go to [www.fafsa.gov](http://www.fafsa.gov), click “Login.”
2. Enter the student’s FSA ID Username or Verified E-mail Address and FSA ID Password. Click “NEXT.”
3. Make sure the correct year’s FAFSA is selected on the tab at the top of the screen. Click on “Make FAFSA Corrections” at the bottom.
4. Create a save key.
5. Click on “Financial Information” at the top of the screen. Then, at the bottom of the screen, enter in your/your parent’s FSA ID information (depending on whose information you are linking). Click “LINK TO IRS.”
6. Click “OK” to continue to the IRS website to retrieve your/your parent’s tax information.
7. Click “OK” on the popup message on the IRS website.
8. On the IRS website, enter the requested information EXACTLY as it appears on your tax return. (i.e. if avenue is abbreviated on your tax return, use the abbreviation on the IRS website.) Click “submit” at the bottom of the screen.

Welcome, new user!

2016-2017 2015-2016

**Current Application Status: Processed Successfully**

Congratulations, your FAFSA was successfully processed.

**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

Federal Student Aid the AMERICAN MIND® Free Application for Federal Student Aid

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

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.

Enter your FSA ID and click **Link To IRS**.

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address [Forgot Username](#) [Forgot Password](#)

FSA ID Password **LINK TO IRS**

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

9. If the IRS is able to validate your identification, your tax information will display. Check mark the box to transfer tax information, then click “Transfer Now.”
10. You will then be taken back to the FAFSA website. A green box will appear at the top of your screen if the IRS was successful at downloading your tax information.
11. **Dependent students only:** Note that if you mark “yes” to skip the remaining questions of your parent’s financial information, you will not be able to fill in student tax information.
12. **Dependent students only:** Repeat the steps above for the student’s financial information.

IRS.gov Return to FAFSA | Log Out | Help Español

**Parent 2015 Federal Income Tax Information**

The information below is your tax information that will help you answer some of the questions on the FAFSA.

Tax Year	My Tax Information	FAFSA Question Numbers
2015	2015	
Name(s)	Gdlt Data	
Social Security Number	*** - ** - 2656	
Filing Status	Married-Filed Joint Return	Question 82 on the FAFSA
Type of Tax Return Filed	1040	Question 81 on the FAFSA
Adjusted Gross Income	\$33,400	Question 85 on the FAFSA
Income Earned From Work	\$35,430	Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Parent 1: Question 88 on the FAFSA and/or Parent 2: Question 89 on the FAFSA
Income Tax	\$8,900	Question 86 on the FAFSA
IRS Exemptions	1	Question 87 on the FAFSA
Education Credits	\$5,900	Question 93a on the FAFSA
IRA Deductions and Payments	\$4,400	Question 94b on the FAFSA
Tax-Exempt Interest Income	\$4,650	Question 94d on the FAFSA
Unfired IRA Distributions	\$7,900	Question 94e on the FAFSA
Unfired Pensions	\$6,900	Question 94f 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

**You have successfully transferred your 2015 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.”

You indicated that your mother filed an IRS 1040. Was she eligible to file a 1040A or 1040EZ?

Yes

Do you want to skip the remaining questions about your and your mother's income and assets?

☒ Yes ☐ No

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

13. Sign and submit the student and parent (if dependent) signature(s) by agreeing to the terms and clicking “SIGN.”

14. After you submit your FAFSA you will come to the following confirmation page.

2016-2017 Confirmation Page

Your confirmation page has been sent to you at the e-mail address: abc@fsa.gov

PRINT THIS PAGE Confirmation Number: F 08100051803 11/16/2015 16:22:09 Data Release Number (DRN): 3007

Congratulations, Dependent ! Your FAFSA was successfully submitted to Federal Student Aid.

Does your brother or sister need to complete a FAFSA? If so, you can [transfer your parents' information into a new FAFSA](#) for your brother or sister to save time. Your parents will have to provide a signature again, but that's all.

**What Happens Next**

- You will receive an e-mail version of this page.
- In 3-5 business days, you will receive an e-mail notifying you that your FAFSA was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

School(s) on your FAFSA:

School Name	Graduation Rate	Retention Rate	Transfer Rate	Additional Information from College Navigator
UNIV OF ILLINOIS AT CHICAGO	60%	80%	NA	NA
ALABAMA AGRICULT & MECH UNIV	35%	66%	NA	NA
UNIVERSITY OF IOWA	70%	86%	24%	NA
UNIV OF ILLINOIS @ URBANA-CHAMPAIGN	84%	93%	NA	NA

**Eligibility Information**

**Estimated Expected Family Contribution (EFC) = 002516**

The EFC is a measure of how much you can contribute to the cost of your education. Schools use your EFC to determine your federal student aid eligibility.

The EFC is not how much aid you will receive or how much you have to pay for college.

Based on the [eligibility criteria](#), you may be eligible for the following:

**Pell Grant** Estimate - \$3,225.00

**Direct Stafford Loan** Estimate - \$5,500.00

You may also be eligible to receive other federal, state, or institutional grants, scholarships, and/or work-study.

In addition, you should learn about [federal tax benefits for education](#), including the [American Opportunity Tax Credit \(AOTC\)](#).

If you have questions, visit [www.fafsa.gov](http://www.fafsa.gov) and click the “Help” icon on the FAFSA home page.

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