

## Using the FAFSA IRS Data Retrieval Tool

The Federal Guidelines for the FAFSA application has changed. All tax information must be official in order for financial aid to be awarded and finalized. Therefore, to make this process simpler, FAFSA now has an IRS retrieval tool.

**\*\*\*If you choose not to use the IRS Data Retrieval Tool AND transfer the information, and you are selected for verification you will need to provide the Financial Aid Office with IRS tax transcripts. \*\*\***

The following instructions use the Student section of the FAFSA to illustrate the steps for using the “IRS Data Retrieval Tool” (The parent section is similar)

1. Select “Already Completed”- **Blue** Arrow
2. Then answer the questions in the section where the **Red** Arrow is pointing; Most students will select” None of the above”. If you select one of the other options you may not be able to use the tool.
3. That will open up the section with the **Green** Arrow, where you will type in your pin and click on the button that says link to the IRS.

The screenshot shows the FAFSA Student section, specifically the "Student Tax Information" area. The page header includes the FAFSA logo and navigation tabs for Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. A "STUDENT" label is visible on the left side of the page.

Key elements and arrows in the screenshot:

- A blue arrow points to the "Already completed" dropdown menu in the question: "For 2011, have you completed your IRS income tax return or another tax return?"
- A red arrow points to the "None of the above" checkbox, which is selected.
- A green arrow points to the "LINK TO IRS" button at the bottom of the section.

Text on the page includes:

- "Application was successfully saved."
- "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**.
- Options: My tax filing status is Married Filing Separately, My tax filing status is Head of Household, I filed an amended tax return, I filed a Puerto Rican or foreign tax return, I recently filed my taxes.
- Selected option:  None of the above
- Recommendation: "Based on your response, we recommend that you transfer your information from the IRS into this FAFSA."
- Instruction: "Enter your PIN and click **Link To IRS**."
- Field: "What is your PIN?" with a text input box and a "[Forgot/Don't Know My PIN](#)" link.
- Button: "LINK TO IRS"

Help and Hints section:

- Section: "None of the above"
- Text: "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."
- Text: "Select the check boxes that describe your (and if married, your spouse's) tax filing status, or select **None of the Above**."
- Text: "Select **My tax filing status is Married Filing Separately** if you are married, but you and your spouse filed separate tax returns. (**Note:** This option

- Once you type in the PIN, you will be prompted to this page, you will click OK

**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.

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**

- You have now been redirected to the IRS website, and fill in the information **exactly** as you filed with the IRS. Then 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 as it appears on your 2010 Federal Income Tax Return. **Required fields \***

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	*** - ** - 5342
Date of Birth *	<input type="text"/> / <input type="text"/> / <input type="text"/>
Filing Status * ?	Select One
<b>Address - Must match your 2010 Federal Income Tax Return. ?</b>	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One
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**

6. Once you fill out your information you will be sent to this page, you will confirm the data that comes up and then check the box by the Yellow Arrow. Now click “**Transfer Now**” by the Red Arrow.

## 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)		
Social Security Number	*** - ** -	
Filing Status		
Type of Tax Return Filed	1040	Question 33 on the FAFSA
Adjusted Gross Income	\$30,133	Question 35 on the FAFSA
Income Earned From Work	\$30,133	Question 38 on the FAFSA
Income Tax	\$1,829	Question 36 on the FAFSA
IRS Exemptions	1	Question 37 on the FAFSA
Education Credits	\$0	Question 43a on the FAFSA
IRA Deductions and Payments	\$0	Question 44b on the FAFSA
Tax-Exempt Interest Income	\$0	Question 44d on the FAFSA
Untaxed IRA Distributions	\$0	Question 44e on the FAFSA
Untaxed Pensions	\$0	Question 44f 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

7. Once you transfer your data, it will be reflected on the FAFSA.

It will look like this:

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**

**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."

What income tax return did you file for 2011?  
Transferred from the IRS  
IRS 1040

What was your (and your spouse's) adjusted gross income for 2011?  
\$30,133.00 Transferred from the IRS

**Help and Hints**

**Student's Type of 2011 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 as "Transferred from the IRS."

You must select the income tax return that you filed or will file for 2011:

- IRS 1040

8. Complete the rest of the FAFSA application.

- Always refer to the Help and Hints section to assist you in clarifying what is requested for each question.
- Once all the data is updated make sure you have South Suburban College as a school and submit the application. South Suburban College's school code is **001769**
- Make sure you submit the application when you are done. You will get a confirmation page when the application is complete and submitted. It takes 5-7 business days for South Suburban to get your FAFSA information. Please check your SSC email to confirm that the Financial Aid Office has received your student aid report.