



New Financial Aid Documents 2012-2013

Complete Federal Taxes First!

Steps for Students

1. Complete Federal Taxes
2. Complete FAFSA
3. Use IRS Data Retrieval Tool
4. Submit Financial Information Sheet
5. Submit Copies of Student and Parent (or student/spouse) W-2's
6. Check FinVue for Award

IRS Data Retrieval Tool

- **ABOUT THE TOOL**

- Transfer income information from the IRS to the FAFSA.

- **BENEFITS OF THE TOOL**

- Complete the FAFSA quickly and accurately!
- Increased accuracy in awarding financial aid funds.
- Less paperwork needed to turn in.



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 Step 6 Submit Confirmation

STUDENT

Student Tax Information

Application was successfully saved.

For 2011, have you completed your IRS income tax return or another tax return?
Already completed

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

My tax filing status is Married Filing Separately

My tax filing status is Head of Household

I filed as an amended tax return

I filed a Puerto Rican or foreign tax return

I recently filed my taxes

None of the above

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

Enter your PIN and click **LINK TO IRS**.

What is your PIN?
 [If you don't know your PIN](#)

LINK TO IRS

Help and Hints
None of the above

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.

Select the check boxes that describe you (and if married, your spouse's) tax filing status, or select None of the Above.

Select My tax filing status is Married Filing Separately if you are married, but you and your spouse filed separate tax returns.

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

FINANCIAL INFORMATION:


Answer questions to determine whether or not you (or your parents) are eligible to use the tool. If you are eligible to use the IRS tool, you will be prompted to:

1. Enter your PIN number
2. Select **“LINK TO IRS”**

IRS Data Retrieval Tool

- Complete the information requested.
- Address information entered must match IRS database address.

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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 as it appears on your 2011 Federal Income Tax Return. Required fields *

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	***-**-****
Date of Birth *	MM / DD / YYYY
Filing Status * ?	Select One
Address - Must match your 2011 Federal Income Tax Return. ?	
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](#)

[IRS Privacy Policy](#)

IRS Data Retrieval Tool



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	<2008>	
Name (a)	<Joe & Jane Smith>	
Social Security Number	<***-**-6789>	
Filing Status	<Married, Filing Joint Return>	
Type of Tax Return Filed	<1040>	Question <#> on the FAFSA
Adjusted Gross Income	<\$126,721>	Question <#> on the FAFSA
Income Tax	<\$11,400>	Question <#> on the FAFSA
IRS Exemptions	<5>	Question <#> on the FAFSA
Education Credits	<\$2,500>	Question <#> on the FAFSA
IRA Deductions and Payments	<\$2,500>	Question <#> on the FAFSA
Tax-Exempt Interest Income	<\$2,500>	Question <#> on the FAFSA
Untaxed IRA Distributions	<-\$2,500>	Question <#> on the FAFSA
Untaxed Pensions	<-\$2,500>	Question <#> on the FAFSA

1. Review your tax information for accuracy.
2. Check the appropriate box below.
3. Select Transfer Now.

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

Data transfer completed!

IRS Data Retrieval Tool

If you did not or could not use the IRS data retrieval tool on FAFSA, we will need:

- **IRS Tax Return Transcript**
- **IRS Tax Account Transcript**

Order at www.irs.gov (select "Tools").

Processing time is approx. 5-10 days, so don't delay!