

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
- Submit Copies of Student and Parent (or student/spouse) W-2's
- 6. Check FinVue for Award



ABOUT THE TOOL

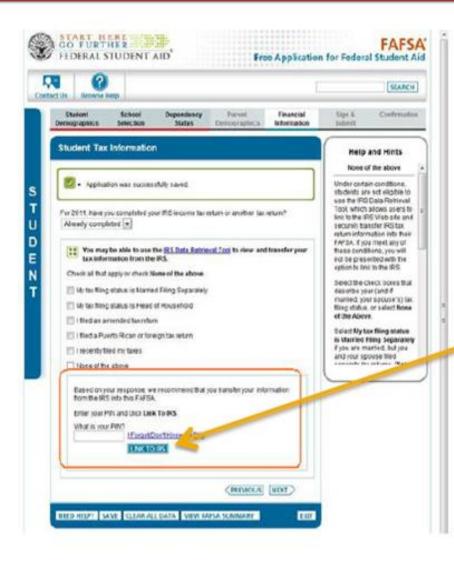
Transfer income information from the IRS to the FAFSA.

• BENEFITS OF THE TOOL

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







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:

- L. Enter your PIN number
- 2. Select "LINK TO IRS"



- Complete the information requested.
- Address

 information
 entered must
 match IRS database
 address.

| IRS.gov | Return to FAFSA Log Out F |
|---|---|
| Get My Federal Income Tax Informat See our <u>Privacy Notice</u> regarding our request for your personal i Enter the following information as it appears on your 2011 F | nformation. |
| First Name * | |
| Last Name * | |
| Social Security Number * | *** _ ** |
| Date of Birth * | |
| Filing Status * 🔞 | Select One |
| Address - Must match your 2011 Federal Income Tax Return. | 0 |
| Street Address * | I |
| P.O. Box (Required if entered on your tax return) | |
| Apt. Number (Required if entered on your tax return) | [|
| Country * | United States |
| City, Town or Post Office * | |
| State/U.S. Territory * | Select One |
| ZIP Code * | |
| elect the button below to exit the IRS system and a turn 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 |

IRS Privacy Policy



Page 1 of 1

| IRS.gov | | | |
|---|-----------------------------------|-----------------------------|--|
| Parent <yyyy> Federal Income Tax Information The information below is yourtax information that will help you answer some of the questions on the FAPSA</yyyy> | | | |
| | | | |
| TaxYear | 200Þ | | |
| Name (a) | <jos &="" jane="" smith=""></jos> | | |
| So cial Security Number | <***.**.\$70\$> | | |
| Filing Status | (Married-Filed JointReturn) | | |
| Type of Tax Return Filed | <10.40> | Question Allo on the FAFSA | |
| Adjusted Grous Income | <\$125,721> | Question step on the FAFSA | |
| Income Tax | <\$31,400> | Question KAR> on the FAFSA | |
| IRS Exemptions | c§> | Queston - MP- on the FAFSA | |
| Education Credits | <\$2,500> | Question calls on the FAFSA | |
| IRA Deductions and Payments | <\$2,500> | Question CED on the FAFSA | |

Print this page for your records before choosing an option below

Transfer My Tax Information into the FAFSA 😧

Tax-Exempt interest income

Untax ed IRA Distributions

Untaxed Pensions

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.

<\$2.500+

< 12.600 -

<12500×

Do Not Transfer My Tax Information and Return to the FAFSA 1

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

Question Kill on the FATSA

Question same on the FAFEA

Question dep on the FAFSA

1. Review your tax information for accuracy.

- 2. Check the appropriate box below.
- 3. Select Transfer Now.

Data transfer completed!

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!



Office of Student Financial Services Andrews University