

APPLY FOR FINANCIAL AID 2013-2014

STEPS FOR STUDENTS

1. Electronically file Federal Taxes
2. Complete FAFSA
3. Use IRS Data Retrieval Tool
4. Submit Financial Information Sheet
5. Check FinVue for Verification Forms
6. Check FinVue for Award

IRS DATA RETRIEVAL TOOL

- ABOUT THE TOOL

- Transfers 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

The screenshot shows the FAFSA website's 'Financial Information' section. A blue sidebar on the left is labeled 'STUDENT'. The top navigation bar includes 'START HERE GO FURTHER FEDERAL STUDENT AID', 'FAFSA Free Application for Federal Student Aid', and a 'SEARCH' button. Below the navigation bar are tabs for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'Financial Information' tab is active, showing the 'Student Tax Information' section. A green checkmark icon indicates 'Application was successfully saved'. A dropdown menu shows 'Already completed'. A message states: 'You may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.' Below this, a list of checkboxes includes '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', and 'I recently filed my taxes'. The 'None of the above' option is selected. A red box highlights the instruction: '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? I forgot/Don't know my PIN. LINK TO IRS'. A yellow arrow points from the text 'LINK TO IRS' in the instructions to the 'LINK TO IRS' button. At the bottom, there are buttons for 'PREVIOUS', 'NEXT', 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and '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"**

Complete the information requested (Address entered must match IRS database address)


IRS DATA RETRIEVAL TOOL

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

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 (s)	<Joe & Jane Smith>	
Social Security Number	<***-**-6789>	
Filing Status	<Married - Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question <##> on the FAFSA
Adjusted Gross Income	<\$126,721>	Question <##> on the FAFSA
Income Tax	<\$31,400>	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

 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

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

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

- Order at www.irs.gov (select “Tools”).

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

- Visit your local IRS office.

FINANCIAL AID VERIFICATION

- WHAT IS VERIFICATION?
 - It is a process to verify information on the FAFSA, not everyone is selected.
 - If you are selected we are required to collect this information before awarding federal aid.
- WHAT TO DO IF SELECTED?
 1. Check FinVue for documents needed.
 2. Documents vary from student to student.
 3. Turn in verification documents promptly.