

IRS DATA RETRIEVAL TUTORIAL

FILE FEDERAL TAXES FIRST!



Office of Student
Financial Services
Andrews University

IRS DATA RETRIEVAL TOOL

- ABOUT THE TOOL
 - Transfers income information from the IRS to the FAFSA using the IRS Data Retrieval Tool.
 - Available two weeks after filing electronically if you are getting a tax refund. Paper filing and/or unpaid taxes will delay the process until the end of June/July.
- 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

- On FAFSA Financial Information Tab:

Answer questions to determine whether you and/or your parents are eligible to use the tool. If eligible to use the IRS tool, you and/or your parents will be prompted to:

1. Enter the FSA ID username and password
2. Select "[LINK TO IRS](#)"

See screen shots on the next slides



Help

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Sign &
Submit

Confirmation

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Parent Tax Information



Application was successfully saved.

For 2015, have your parents completed their IRS income tax return or another tax return?

Already completed

For 2015, what is your parents' tax filing status according to their tax return?

Married-Filed Joint Return



To determine if you, the parents, can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into the FAFSA, **answer the following question(s):**

Did you, the parents, file a Form 1040X amended tax return?

☐ Yes ☒ No

Did you, the parents, file a Puerto Rican or foreign tax return?

☐ Yes ☒ No

Did you, the parents, file 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, the parents, 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**.

Which parent are you?

Select

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

FSA ID Username or Verified E-mail Address

FSA ID Password

[Create an FSA ID](#)
[Forgot Username](#)
[Forgot Password](#)

LINK TO IRS

PREVIOUS

NEXT

NEED HELP?

SAVE

CLEAR ALL DATA

VIEW FAFSA SUMMARY

EXIT

Help and Hints

Recently Filed Taxes?

If you, the parent(s), filed your taxes electronically within the last 3 weeks, or by mail within the last 11 weeks, select **Yes**; otherwise, select **No**.

If you filed your taxes within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#); however, if you are not able to transfer your tax return information into your FAFSA at this time, you can try again in a week or two or you can manually enter your tax return information.



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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 FAFSA information will be saved.

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 log in to open your saved FAFSA.

Click **OK** to continue. Otherwise, click **Cancel**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

CANCEL

OK

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2015 Federal Income Tax Return.

Required fields *

First Name *	<input type="text" value="m"/>
Last Name *	<input type="text" value="FSA"/>
Social Security Number *	*** - ** - 1415
Date of Birth *	<input type="text" value="11"/> / <input type="text" value="10"/> / <input type="text" value="1980"/>
Filing Status *	<input type="text" value="Married Filing Joint Return"/>
Address - Must match	
Street Address *	<input type="text"/>
P.O. Box (Required)	<input type="text"/>
Apt. Number (Required)	<input type="text"/>
Country *	<input type="text"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	<input type="text" value="Select One"/>
ZIP Code *	<input type="text"/>

Message from webpage



THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!
Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

OK


Select the button below to exit the IRS system and return to your FAFSA.

[Return to 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.

[Submit](#)


IRS DATA RETRIEVAL TOOL

[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.

	My Tax Information	FAFSA Question Numbers ?
Tax Year	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
Untaxed IRA Distributions ?	\$7,900	Question 94e on the FAFSA
Untaxed 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 ?

☐ 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.

[Transfer Now](#) ? [Do Not Transfer](#) ?

[IRS Privacy Policy](#)

1. Review your tax information for accuracy.

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

3. Check the appropriate box below.

4. Select Transfer now.

Data Transfer Completed!



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Parent Financial Information



■ You have successfully transferred your 2015 IRS tax information.

The parents' 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 type of income tax return did your parents file for 2015?

Transferred from the IRS

IRS 1040

What was your parents' adjusted gross income for 2015? This amount is found on IRS Form 1040-line 37.

\$ 33,400 .00

Transferred from the IRS

Your parents' total income earned from working in 2015 was transferred from the IRS. This amount is the total of IRS Form 1040-lines 7+12+18.

\$ 35,430 .00

Of the \$35,430.00, enter the amount that your parents each earned from working in 2015. [How do I do this?](#)

Your Parent 1 (father/mother/stepparent) \$.00

Your Parent 2 (father/mother/stepparent) \$.00

Did either (or both) of your parents file an IRS Schedule K-1 (Form 1065) for 2015?

☐ Yes ☒ No

As of today, is either of your parents a dislocated worker?

Don't know

In 2014 or 2015, did your parents receive benefits from any of the federal benefits programs listed below? Check all that apply or check **None of the above**.

☐ Supplemental Security Income (SSI)

☐ Supplemental Nutrition Assistance Program ([SNAP](#))

☐ Free or Reduced Price Lunch

☐ Temporary Assistance for Needy Families ([TANF](#))

☐ Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

☐ None of the above

Help and Hints

Parents' Type of 2015 Tax Form Used Question 81

If your parent uses the IRS Data Retrieval Tool and transfers his / her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

If the answer to this question is not pre-filled, you must select the income tax return that your parents filed or will file for 2015:

- IRS 1040
- IRS 1040A or 1040EZ
- A foreign tax return
- A tax return for a U.S. territory or a Freely Associated State (including Puerto Rico).

IRS DATA RETRIEVAL TOOL

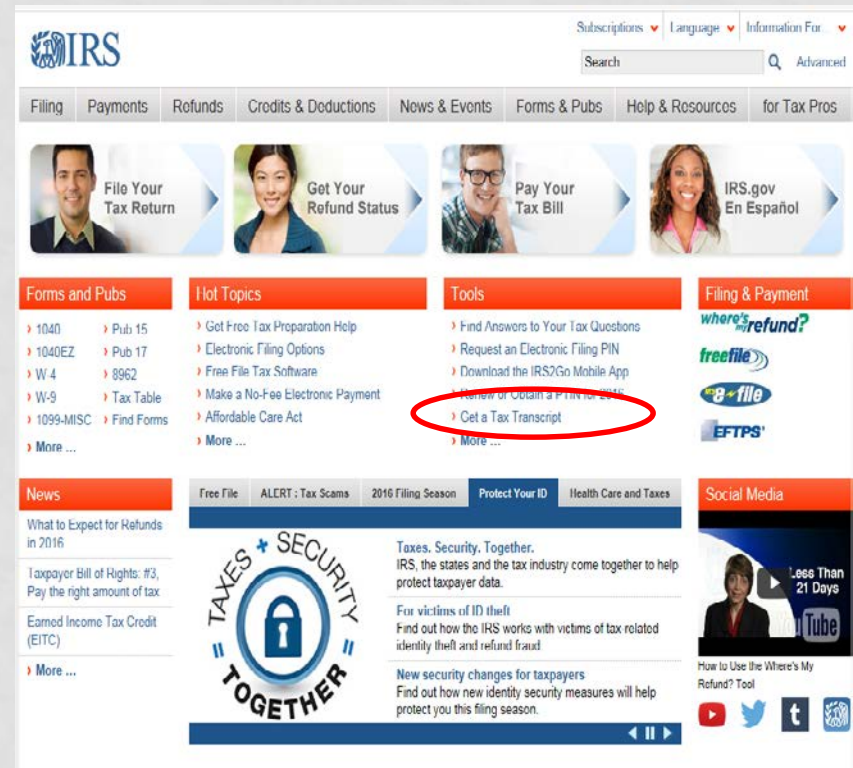
If you did not or could not use the IRS data retrieval tool on FAFSA, we will need:

IRS Tax Return Transcript

Order at:

<https://www.irs.gov/Individuals/Get-Transcript>

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



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