

FAFSA -- I.R.S. Data Retrieval Process

Overview

Officials in the Office of Federal Student Aid and the Internal Revenue Service have worked together to develop a process to simplify the steps that families must take each year to complete the Free Application for Federal Student Aid ("FAFSA")

Federal Student Aid staff have redesigned the "FAFSA on the Web" site to simplify the application process for applicants.



How This Will Work on the 2012-2013 FAFSA

The "IRS Data Retrieval" process for the 2012-2013 academic year is tentatively scheduled to be available *starting February 1, 2012*

- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after the return has been filed,
- Data from paper tax returns will be available in 6-8 weeks.

All **2012-2013 FAFSA On The Web** applicants, and the parents of dependent applicants, who indicate that they have filed their federal tax returns prior to completing their FAFSA and who are otherwise eligible will be directed to use the FAFSA-IRS Data Retrieval process to complete their FAFSA more easily and accurately.


Applicants who chose not to use the FAFSA-IRS Data Retrieval process, or who retrieve IRS data but subsequently change it, will be informed that they will need to explain to their institutions why information they provided is more accurate than the information that would have been obtained directly from the IRS. They will need to provide information obtained directly from the IRS.

In general, all applicants who have already filed but elect to not use the retrieval process will be subject to being selected for verification based upon the risk they pose to federal funds and, if they are selected, will be required to support their reported FAFSA data with information obtained directly from the IRS.

The screenshot shows the FAFSA website interface. At the top, it says "START HERE GO FURTHER FEDERAL STUDENT AID" and "FAFSA Free Application for Federal Student Aid". Below this are navigation links for "Contact Us" and "Browse Help", and a search bar. A horizontal menu bar contains tabs for "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Parent Demographics" tab is selected, and the "Parent Tax Information" section is active. A green box at the top of this section contains a checkmark and the text "Application was successfully saved." Below this, a question asks: "For 2010, have your parents completed their IRS income tax return or another tax return?" with a dropdown menu set to "Already completed". A link "View and Transfer your 2010 Tax Information from the IRS" is provided, along with instructions on how to use the tool. A note explains that if taxes were recently filed, the information may not be available yet. Below the note, there is a field for "Enter your PIN and click Link To IRS." and a dropdown menu for "Which parent are you?" set to "Select". A "SKIP THIS OPTION" button is available. At the bottom of the section, there are "PREVIOUS" and "NEXT" buttons. A vertical "PARENT" label is on the left side of the page. On the right, a "Help and Hints" box explains the purpose of the question and lists options: "Select Father / Stepfather" and "Select Mother / Stepmother". At the very bottom of the page, there are buttons for "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT".

Families **must actively choose** to utilize the data retrieval tool. If they choose to do so, they will be transferred to the Internal Revenue Service web site.

The page at https://fafsaed.gov says:

 You are now leaving FAFSA on the Web and will be linked to the IRS Web site to view your IRS tax information. If you click 'OK' your FAFSA will be saved and your current session will end.

Your saved FAFSA will automatically open when you transfer your information from the IRS. If you do not transfer your information from the IRS, you will have to login to open your saved FAFSA.





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

If you have questions or problems using this tool, contact Federal Student Aid's [Customer Service](#).

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 <2008> Federal Income Tax Return.  Required fields*

First Name*	<input type="text" value="Joe"/>
Last Name*	<input type="text" value="Smith"/>
Social Security Number*	*** - ** - 6789
Date of Birth*	01 / 04 / 1990
Address* 	<input type="text"/>
	<input type="text"/>
Apt. Number (Required if it appears 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"/>
Filing Status*	Select One 

Applicants will need to authenticate their identity before any personal information is displayed.

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](#)

Tax data will be presented and the applicant will have the option to "Transfer" the tax information to the FAFSA. Applicants can also choose NOT to transfer the data to the FAFSA.

Transferred data will have a notation - "**Transferred from the IRS**"

Remember,

- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after the return has been filed,
- Data from paper tax returns will be available in 6-8 weeks.

Some Families Will Not Be Able to Use This Tool

- A married independent applicant and spouse who filed separate tax returns;
- When the parents of a dependent student filed separate tax returns.
- An applicant or applicant's parent who have had a change in marital status after the end of the tax year on December 31, 2011.
- The applicant, or parent or spouse, as applicable, who has filed an amended tax return, will not be able to use the "DRT".

These families should contact the financial aid office at 785-309-3106 or via email at susan.eberwein@salinatech.edu for more information.