

Steps for Utilizing the IRS Data Retrieval Tool

Step 1:

Log into your Fafsa application using your FSA ID and Password. Once logged in, make sure you are selecting the 2016-2017 tab, then select **["Make Fafsa Corrections"](#)**

The screenshot shows the FAFSA website interface. At the top, there is a navigation bar with 'Home' and 'Help' icons, a 'Welcome,' message, a 'Logout' button, and a search box. The main content area is titled 'My FAFSA' and includes a 'Welcome,' message. Below this, there are two tabs: '2016-2017' (selected) and '2015-2016'. A red arrow points to the '2016-2017' tab. The main content area displays the 'Current Application Status: Processed Successfully' and a congratulatory message. To the right, a box shows 'Original Application Submitted: 03/10/2016' and 'Processed: 03/11/2016'. Below this, a section titled 'What Happens Next' lists several bullet points. A second red arrow points to the 'Make FAFSA Corrections' link in the 'You can also:' section. The bottom of the page features a 'NEED HELP?' button.

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Home Help Welcome, Logout SEARCH

My FAFSA

Welcome,

2016-2017 2015-2016

Current Application Status: Processed Successfully

Congratulations, your FAFSA was successfully processed.

Original Application
Submitted: 03/10/2016
Processed: 03/11/2016

What Happens Next

- Your FAFSA information was made available to the school(s) you listed on your FAFSA.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA

FSA ID Last Time, Date FSA ID Used: 11:00, 03/14/2016

FSA ID Status:
[User Account Management](#)
You can use your FSA ID to sign your FAFSA electronically or make corrections to your FAFSA.

Create a shareable file with some of your student information.
[Learn More](#)

NEED HELP?

Step 2:

- Select the **“Financial Information Tab”** on the top of the Fafsa application
- Answer the question according to how you filed your taxes: For 2015, have you completed your IRS income return of another return?

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Help [SEARCH]

Student Demographics | School Selection | Dependency Status | Parent Demographics | **Financial Information** | Sign & Submit | Confirmation

Student Tax Information

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

Already completed ▼
Select
Already completed x filing status according to your tax return?
Will file return ▼
Not going to file

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

Did you file a Form 1040X amended tax return?
 Yes No

Did you file a Puerto Rican or foreign tax return?
 Yes No

Did you file your 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 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.

[LINK TO IRS](#)

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints

Student Filed 2015 Income Tax Return? Question 32

You must select the answer that describes your tax filing status:

- Already completed
- Will file
- Not going to file

If you indicate you “Will file” a 2015 tax return and your 2015 income is similar to your 2014 income, use your 2014 income tax return to provide estimates for questions about your income. If your income is not similar, click **Income Estimator** for assistance estimating your adjusted gross income, and answer the remaining questions about your income to the

Step 3:

Select the tax filing status according to how you/your parents filed their 2015 Federal Tax Return

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Help [SEARCH]

Student Demographics | School Selection | Dependency Status | Parent Demographics | **Financial Information** | Sign & Submit | Confirmation

Student Tax Information

For 2015, have you completed your IRS income tax return or another tax return?
Already completed ▾

For 2015, what is your tax filing status according to your tax return?
Married-Filed Joint Return ▾

- Select
- Single
- Head of Household
- Married-Filed Joint Return
- Married-Filed Separate Return
- Qualifying Widow(er)
- Don't know

Did you file a Puerto Rican or foreign tax return?
 Yes No

Did you file your 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 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.

[LINK TO IRS](#)

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints

Student's 2015 Tax Return Filing Status Question 34

If you filed or will file a tax return, you must select your tax return filing status for 2015:

- Single
- Head of Household
- Married-Filed Joint Return
- Married-Filed Separate Return
- Qualifying Widow(er)
- Don't know

If you (and if married, your spouse) filed a 1040 or 1040A tax return, select the tax return filing status from the "Filing Status" field of your tax return.

If you (and if married, your

STUDENT

Step 4:

Answer all the questions **"NO"**, then select **"Link to IRS"**

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Help [SEARCH]

Student Demographics | School Selection | Dependency Status | Parent Demographics | Financial Information | Sign & Submit | Confirmation

Student Tax Information

For 2015, have you completed your IRS income tax return or another tax return?
Already completed ▾

For 2015, what is your tax filing status according to your tax return?
Married-Filed Joint Return ▾


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

Did you file a Form 1040X amended tax return?
 Yes No

Did you file a Puerto Rican or foreign tax return?
 Yes No

Did you file your 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 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.

 [LINK TO IRS](#)

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints

Student's 2015 Tax Return Filing Status Question 34

If you filed or will file a tax return, you must select your tax return filing status for 2015:


- Single
- Head of Household
- Married-Filed Joint Return
- Married-Filed Separate Return
- Qualifying Widow(er)
- Don't know

If you (and if married, your spouse) filed a 1040 or 1040A tax return, select the tax return filing status from the "Filing Status" field of your tax return.

If you (and if married, your

Step 5:

Once you select **“Link to IRS”**, it will transfer you to the IRS Website where you will enter your **Address** as it appears on the 2015 Federal Tax Return. Once your address is entered, click on **“Submit”**.



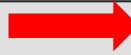

 [Return to FAFSA](#) | [Log Out](#) | [Help](#)

[Español](#)

Get My Federal Income Tax Information


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

Enter the following information from your 2015 Federal Income Tax Return. [?](#) Required fields *

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	*** - ** - 1421
Date of Birth *	<input type="text"/> / <input type="text"/> / <input type="text"/>
Filing Status * ?	Married-Filed Joint Return ▼
Address - Must match your 2015 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.



[IRS Privacy Policy](#)





Step 6:


Once **“Submit”** is clicked, you will see all of your tax information. You will then select **“Transfer My Tax Information into the Fafsa”**, then **“Transfer Now”**.


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

Student 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)		
Social Security Number		
Filing Status	Married-Filed Joint Return	Question 34 on the FAFSA
Type of Tax Return Filed	1040	Question 33 on the FAFSA
Adjusted Gross Income		Question 36 on the FAFSA
Income Earned From Work 		Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Student: Question 39 on the FAFSA and/or Spouse: Question 40 on the FAFSA
Income Tax		Question 37 on the FAFSA
IRS Exemptions	3	Question 38 on the FAFSA
Education Credits	\$0	Question 44a on the FAFSA
IRA Deductions and Payments	\$0	Question 45b on the FAFSA
Tax-Exempt Interest Income	\$0	Question 45d on the FAFSA
Untaxed IRA Distributions 	\$0	Question 45e on the FAFSA
Untaxed Pensions 	\$0	Question 45f 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.



[IRS Privacy Policy](#)

Step 7:

After you select "Transfer Now", you will be transferred back to Fafsa where all of your tax information will be populated in the correct field. **DO NOT** change any data element that shows **"Transferred from the IRS"**!

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Help [SEARCH]

Student Demographics | School Selection | Dependency Status | Parent Demographics | Financial Information | Sign & Submit | Confirmation

Student Financial Information

You have successfully transferred your 2015 IRS tax information.
Your 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 income tax return did you file for 2015?
IRS 1040 **Transferred from the IRS**

What was your (and your spouse's) adjusted gross income for 2015? This amount is found on IRS Form 1040-line 37.
\$ [] .00 **Transferred from the IRS**

Your (and your spouse's) 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.
\$ [] .00

Of the \$91,145.00, enter the amount that you and your spouse each earned from working in 2015. [How do I do this?](#)
You \$ [] .00
Your Spouse \$ [] .00

Did you or your spouse file an IRS Schedule K-1 (Form 1065) for 2015?
 Yes No

As of today, are you (or your spouse) a dislocated worker?
Select []

PREVIOUS NEXT

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Help and Hints

Spouse's 2015 Income Earned from Work
Question 40

If you are married and use the IRS Data Retrieval Tool, your and your spouse's total income earned from working is transferred from the IRS. You are required to enter your spouse's portion of the transferred amount.

If your spouse filed a 1040 tax return and you use the IRS Data Retrieval Tool, tax information from IRS Schedule K-1 (Form 1065) is not transferred from the IRS. You are required to enter the amount that your spouse reported in Box 14 [Code A] of IRS Schedule K-1 (Form 1065), if applicable.

Step 8:

Continue your Fafsa by clicking the "Next Button" and repeat for Parent if considered a dependent student. **REMINDER:** Sign and Submit your Fafsa application for correction so that LTU can receive the updated application. Once this is completed, please email your Financial Aid Counselor so he/she can look for the updated application.

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[SEARCH](#)

Student Demographics | **School Selection** | **Dependency Status** | **Parent Demographics** | **Financial Information** | **Sign & Submit** | Confirmation

Sign & Submit

Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a preparer?
 Yes No

Student Signature

Student's Social Security Number

Student's last name

Student's date of birth

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same

I, the student, agree to the terms outlined above.
 Agree Disagree

[SIGN](#)

[PREVIOUS](#) [SUBMIT MY FAFSA NOW](#)

Help and Hints

Are you a preparer?

A preparer is anyone who charges a fee for helping you fill out your FAFSA.

Typically high school counselors, school financial aid administrators, or other mentors do not charge a fee to help you complete your application, so they are not considered preparers unless you paid them for their services.

If you are a preparer, select **Yes**.

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)