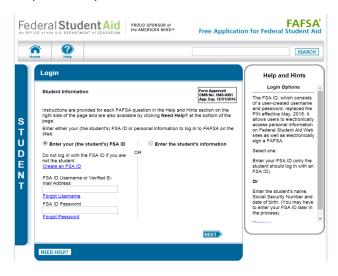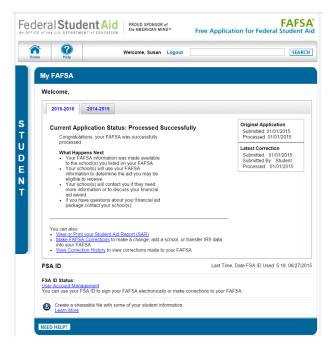IRS Data Retrieval Tool for FAFSA

Step 1: Go to fafsa.gov and click "Login"

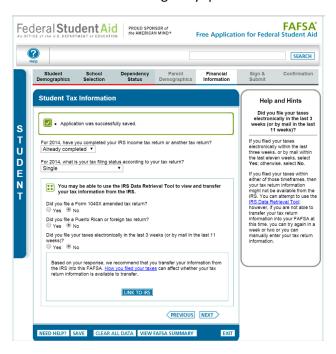Step 2: Enter your FSA Username and Password and click "Next"

Step 3: Click "Make FAFSA Corrections."

Step 4: Create a Save Key and click "Next."

Step 5: Click on the "Financial Information" tab. Select "Already Completed" for the tax return filing status and answer the eligibility questions.

Step 6: If you are eligible to use the IRS Data Retrieval Tool, you can now click on the LINK TO IRS button. If you are not eligible to use the IRS Data Retrieval you must request a tax return transcript from https://www.irs.gov/Individuals/Get-Transcript

Step 7: Click "OK" to leave the FAFSA website and enter the IRS Data Retrieval Tool website.

Step 8: Click "OK" to accept the IRS Data Retrieval Tool terms of use.

Step 9: Enter the requested information and click "Submit." Remember to enter your address exactly as it appeared when you filed your taxes.

Step 10: Review the information that the IRS has retrieved from your tax returns. Check the box to "Transfer My Tax information into the FAFSA" and click "Transfer Now." Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.

Student 2014 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

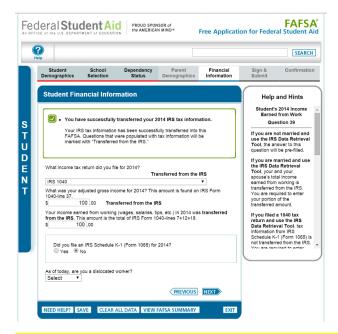|	My Tax Information	FAFSA Question Numbers ❓
Tax Year	2014	
Name(s)		
Social Security Number	*** - ** -	
Filing Status		Question 34 on the FAFSA
Type of Tax Return Filed		Question 33 on the FAFSA
Adjusted Gross Income		Question 36 on the FAFSA
Income Earned From Work ❓		Question 39 on the FAFSA
Income Tax		Question 37 on the FAFSA
IRS Exemptions		Question 38 on the FAFSA
Education Credits		Question 44a on the FAFSA
IRA Deductions and Payments		Question 45b on the FAFSA
Tax-Exempt Interest Income		Question 45d on the FAFSA
Untaxed IRA Distributions ❓		Question 45e on the FAFSA
Untaxed Pensions ❓		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.   [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] ❓
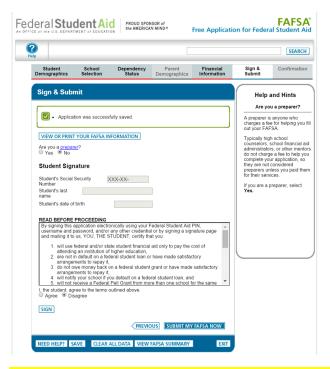
Step 11: Do not update any answers that say "Transferred from the IRS" or your school may require you to supply additional documentations. Answer the additional questions and click "Next."

Note: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financial Information Section and once under the Parent Financial information section before submitting the FAFSA.

Step 12: Continue to the "Sign & Submit" tab. Follow all of the instructions carefully to submit your FAFSA correction.

Remember to print or save the confirmation page for your records.