IRS Data Retrieval Tool
2015-2016 FAFSA

Financial Aid Office
University of California, San Diego
What is the IRS Data Retrieval Tool?

- The IRS Retrieval Tool gives FAFSA applicants and parents the ability to transfer their data from the IRS to the FAFSA
- The Retrieval Tool saves time and increases the accuracy of FAFSA information
- Applicants selected for Verification are encouraged to use the tool to update their FAFSA data as well
Eligibility

**Students/Parents eligible to use the IRS Retrieval Tool:**

- Must have valid SSN
- Must have filed a 2014 Federal Tax Return
- Date of filed Tax Return is:
  - More than 2 weeks if electronic
  - More than 8 weeks if by mail
- Must have a Federal Aid PIN number
- Marital status has not changed since December 31, 2014

**Students/Parents NOT eligible to use the IRS Retrieval Tool:**

- Filed an amended 2014 Federal Tax Return
- Not filing a 2014 Federal Tax Return
- Taxes filed recently
  - Less than 2 weeks if electronic
  - Less than 8 weeks if by mail
- Filing status is Married Filing Separately
- Filing status is Unmarried but both parents living together
- Filing status is Head of Household and marital status is married
- Filed a Puerto Rican or foreign tax return
Where to Start:

• Log on to: www.fafsa.ed.gov

• Select Start A New FAFSA if this is your first time completing this application

• Select Login if you have completed this application in the past

• Once logged in, the Data Retrieval Tool will be found under Financial Information
Parent Tax Information

- Parents will select their 2014 tax return filing status
  - Already Completed
  - Will File
  - Not Going to File
Parent Tax Information

- Parents will select tax filing marital status
- These options determine whether parents are eligible to use the IRS Retrieval Tool
- Refer to slide 3 to see which marital statuses are not eligible for IRS Data Retrieval.
- Select NEXT
Parent Tax Information

Note:
• If marital status was answered “Unmarried and both parents are living together” on question 59, the marital filing status question will not appear under Financial Information.

• IRS Data retrieval is NOT an option

• Select NEXT and continue completing FAFSA
Parent Tax Information

If Parent marital status is eligible for IRS Data Retrieval, the following 3 questions must be answered **NO** in order to LINK TO IRS.

If any are answered **YES**, the IRS Data Retrieval is not an option.

- Select **NEXT** to continue filing out FAFSA.
Parent Tax Information

• Selected parent should have an existing FAFSA PIN (not the student’s PIN)
  - If neither one has an existing PIN, select Apply for PIN

• Enter parent PIN

• Select LINK TO IRS

• You will be leaving the FAFSA website, but all entered information will be saved

• Select OK
Tax Retrieval
IRS.gov

• Parent will fill in their information
• Be sure all information is entered as it appears on the 2014 Tax Return

• Select **Submit**
Tax Retrieval
IRS.gov

- Review tax information for accuracy

- Check first box to transfer tax information into FAFSA

- Select **Transfer Now**
Parent Tax Information

- IRS data is now transferred to FAFSA

- **DO NOT** make changes to any of the financial information retrieved

- Select **NEXT** and continue to Student Financial Information
Student Tax Information

- Student will select 2014 tax return filing status
  - Already Completed
  - Will File
  - Not Going to File

- Select NEXT
Student Tax Information

• Student will select tax filing marital status

• These options determine whether Independent Students are eligible to use the IRS Retrieval Tool

• Refer to slide 3 to see which marital statuses are not eligible for IRS Data Retrieval

• Dependent students will select Single

• Select NEXT
Student Tax Information

• If marital status is eligible for IRS Data Retrieval, the following 3 questions must be answered NO in order to Link to IRS

• If any are answered YES, the IRS Data Retrieval is not an option

• Select NEXT Continue filing out FAFSA
Student Tax Information

• Student will enter existing FAFSA PIN
  • If none exists, select Apply for PIN

• Select LINK TO IRS

• You will be leaving the FAFSA website, but information will be saved

• Select OK
Student Tax Information

- Student will fill in their information
- Be sure all information is entered as it appears on the 2014 Tax Return
- Select Submit
**Student Tax Information**

- Review tax information for accuracy
- Check box to transfer tax information into FAFSA
- Select **Transfer Now**

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**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.

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name(s)</td>
<td></td>
</tr>
<tr>
<td>Social Security Number</td>
<td></td>
</tr>
<tr>
<td>Filing Status</td>
<td></td>
</tr>
<tr>
<td>Type of Tax Return Filed</td>
<td>1040</td>
</tr>
<tr>
<td>Adjusted Gross Income</td>
<td></td>
</tr>
<tr>
<td>Income Earned From Work</td>
<td></td>
</tr>
<tr>
<td>Income Tax</td>
<td></td>
</tr>
<tr>
<td>IRS Exemptions</td>
<td>$0</td>
</tr>
<tr>
<td>Education Credits</td>
<td></td>
</tr>
<tr>
<td>IRA Deductions and Payments</td>
<td>$0</td>
</tr>
<tr>
<td>Tax-Exempt Interest Income</td>
<td>$0</td>
</tr>
<tr>
<td>Untaxed IRA Distributions</td>
<td>$0</td>
</tr>
<tr>
<td>Untaxed Pensions</td>
<td>$0</td>
</tr>
</tbody>
</table>

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 My Tax Information into the FAFSA**

Do Not Transfer My Tax Information and Return to the FAFSA
Student Tax Information

- IRS data is now transferred to FAFSA
- DO NOT make changes to any of the financial information retrieved
Sign & Submit FAFSA

IMPORTANT: ⚠️

Remember to enter **SUBMIT MY FAFSA NOW** after all the IRS Data has been transferred and saved.
Selected for Verification?

Use the IRS Data Retrieval Tool to upload tax information

- Recommended as a way of providing correct IRS data on FAFSA

- Use if estimated tax information was originally used on FAFSA but taxes have now been filed

- Student/Parent meets criteria for using the retrieval tool
Selected for Verification but IRS Data Retrieval Tool is not an option?

Order an IRS Tax Return Transcript

- Student/Parent does not meet criteria for using retrieval tool
  - Filed an amended 2014 Federal Tax Return
  - Not filing a 2014 Federal Tax Return
  - Filing status is Married Filing Separately
  - Filing status is Unmarried and both parents living together
  - Filing status is Head of Household and martial status is married
  - Filed a Foreign Tax Return
- A Tax Return Transcript may be ordered Online or by Mail
- A copy of the Tax Return Transcript must be submitted to the Financial Aid Office along with the Verification Worksheet
- Keep a copy of the Tax Return Transcript for your records
Ordering a Tax Return Transcript

• Go to: www.IRS.gov

• Select Get Transcripts for Your Tax Records
Options for ordering a Tax Return Transcript

- ONLINE
- MAIL
Order Online

- You will be required to create a login if you have not done so already

- Select GET STARTED

- If login already exists, enter User ID and LOGIN
Order Online

Creating a Login

- Enter tax filer information
- Select SEND EMAIL CONFIRMATION CODE and an 8 digit code will be emailed
Order Online

Creating a Login

• Enter 8 digit confirmation code

• Select CONTINUE

Step 2 of 6: Confirmation Code

Do not close this browser window, or you will have to restart the process.
• A confirmation code will be sent to your email address within the next 10 minutes.
• Check your spam folder if you do not receive an email.
• Open your email in another browser window:
  Gmail  Outlook  Yahoo  AOL

Enter Confirmation Code

CANCEL  CONTINUE
IRS.gov

Order Online
Creating a Login

• Fill in blanks for tax filer information as it appears on 2014 tax return

• Select **Login Options**:
  • Create a User ID and Password
  • Proceed as guest

• Select **Continue**
Order Online

NOTE:

If information is entered incorrectly, account will be locked for 24 hours. Try again after 24 hours have passed.

We have locked your account because the information you entered does not match the data on your most recent tax return. If you believe you made a mistake when you entered your data, please try again in 24 hours. If your information has changed recently, please try again in 24 hours using your previous information.
Order Online

Creating a Login

• Answer each question to the best of your knowledge in order for the IRS to verify your identity

• Select CONTINUE
Order Online
Creating a Login

- Create a User ID and Password
- Create a Site Phrase and Site Image

- Select and answer 4 different Challenge Questions from the drop down boxes

- Select CONTINUE
Order Online
Creating a Login

• Once profile is successfully created select **CONTINUE**

• Select reason for requesting a transcript

• Select 2014 Return Transcript for viewing and printing

• Once printed, submit a copy to the Financial Aid Office
IRS.gov

Order by Mail

• Enter tax filer information

• Select CONTINUE
Order by Mail

- The Type of Transcript should be Return Transcript
- Tax Year 2014
- Select CONTINUE
Order by Mail

- If both student and parents filed taxes, both transcripts can be requested here
- Select Request a different transcript
- Select Exit when done
Tax Transcripts

- Transcript/s will be mailed to student/parent within 5-10 days
- Once received, keep original and submit a copy to the Financial Aid Office