

FAFSA IRS Data Retrieval

Step 1:

- Sign into the FAFSA and on the homepage select that you wish to "Make A Correction to an Existing FAFSA." Select the appropriate year.
- Once you are inside the FAFSA, select "Financial Information" on the menu bar. (Figure 1-1)

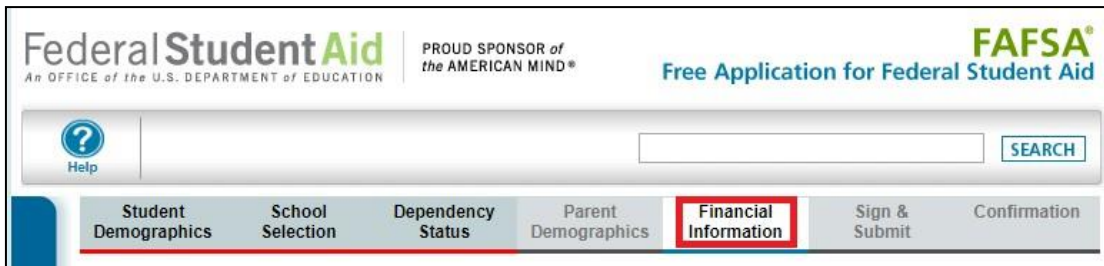


Figure 1-1

- On the Financial Information page, answer the IRS Data Retrieval Tool questions appropriately. If the IRS determines you are eligible, you can perform the Data Retrieval. Click on the "Link to IRS" button. (Figure 1-2)

The image shows the 'Student Tax Information' page. On the left, there is a vertical blue bar with the word 'STUDENT' written vertically. The main content area has a blue header 'Student Tax Information'. Below the header, there is a blue box with an information icon and the text: 'Attention! You must provide financial information from your 2016 tax return on the following pages.' Below that is a green box with a checkmark icon and the text: 'Application was successfully saved.' There are three questions with dropdown menus: 'For 2016, have you completed your IRS income tax return or another tax return?' (dropdown: 'Already completed'), 'For 2016, what is your tax filing status according to your tax return?' (dropdown: 'Married-Filed Joint Return'), and 'Did you file a Puerto Rican or foreign tax return for 2016?' (radio buttons: 'Yes', 'No'). Below the questions is a blue box with a grid icon and the text: 'Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!'. Below this text is a red-bordered button labeled 'LINK TO IRS'. At the bottom of the main content area are two buttons: 'PREVIOUS' and 'NEXT'. At the very bottom of the page is a blue bar with several buttons: 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. On the right side of the page, there is a 'Help and Hints' section with the text: 'Did you file a Puerto Rican or foreign tax return?' followed by instructions: 'If you filed a Puerto Rican or foreign tax return, select Yes; otherwise, select No.' Below that is the text: 'You are not eligible to use the IRS Data Retrieval Tool if you filed a Puerto Rican or foreign tax return.' and 'Related Topics:' followed by a link: 'Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.?'.

Figure 1-2

- You will be taken to a page that will inform you that you will be leaving the FAFSA. Click “Proceed to IRS Site”. (Figure 1-3)

The screenshot shows the FAFSA application interface. At the top left is the 'Federal Student Aid' logo with the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION'. To its right is the text 'PROUD SPONSOR of the AMERICAN MIND®'. On the top right is the 'FAFSA® Free Application for Federal Student Aid' logo. Below the header is a navigation bar with tabs: 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'Financial Information' tab is currently selected. A search bar with a 'SEARCH' button is located to the right of the navigation bar. A 'Help' icon is on the left. A vertical blue bar on the left side of the page contains the word 'STUDENT' in white capital letters. The main content area has a blue header and contains the following text:

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.

For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.
Click **Proceed to IRS Site** to continue. Otherwise, click **Skip IRS Transfer**.

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

At the bottom of the notification area are two buttons: 'SKIP IRS TRANSFER' and 'PROCEED TO IRS SITE'.

Figure 1 - 3

Step 2:

- Click "Ok" to agree to the authorized use page. (Figure 2-1)

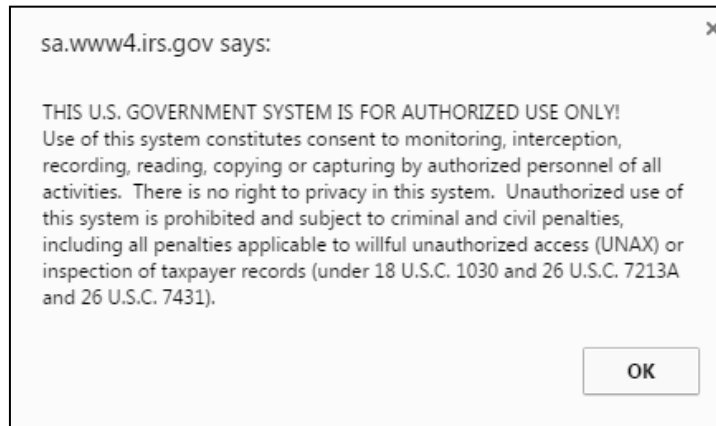



Figure 2-1

- Fill in the required information and click "Submit." (Figure 2-2)

 [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 20XX Federal Income Tax Return. [?](#) Required fields *

| | |
|--|------------------------------|
| First Name * | John |
| Last Name * | Doe |
| Social Security Number * | *** - ** -xxxx |
| Date of Birth * | 10 / 14 / 1970 |
| Filing Status * ? | Married-Filed Joint Return ▾ |
| Address - Must match your 20XX Federal Income Tax Return. ? | |
| Street Address * | 1234 Sample Street |
| P.O. Box (Required if entered on your tax return) ? | |
| Apt. Number (Required if entered on your tax return) | 103 |
| Country * | United States ▾ |
| City, Town or Post Office * | Sample City |
| State/U.S. Territory * | California (CA) ▾ |
| ZIP Code * | 91321 |


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](#)

Figure 2-2

- Continued below....

- Verify the information you entered, select "Transfer My Tax Information into the FAFSA" and click "Transfer Now". (Figure 2-3)



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

20XX Federal Income Tax Information

John A & Jane A Doe


Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.


For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:


| | | |
|------------------------|-------------------------|------------------------------------|
| Tax Year | Type of Return Filed | Untaxed Pensions |
| Name(s) | Adjusted Gross Income | Untaxed IRA Distributions |
| Social Security Number | Income Earned from Work | Tax-exempt Interest Income |
| Filing Status | Income Tax | IRA Deductions and Payments |
| IRS Exemptions | Education Credits | Status of Amended Returns Received |


Refer to your tax records if you have a question about the values you reported.

 Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA Form 

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.



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

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 form.




Figure 2-3

- Continued below....

- You will receive confirmation that your tax information imported into the FAFSA. (Figure 2-4)

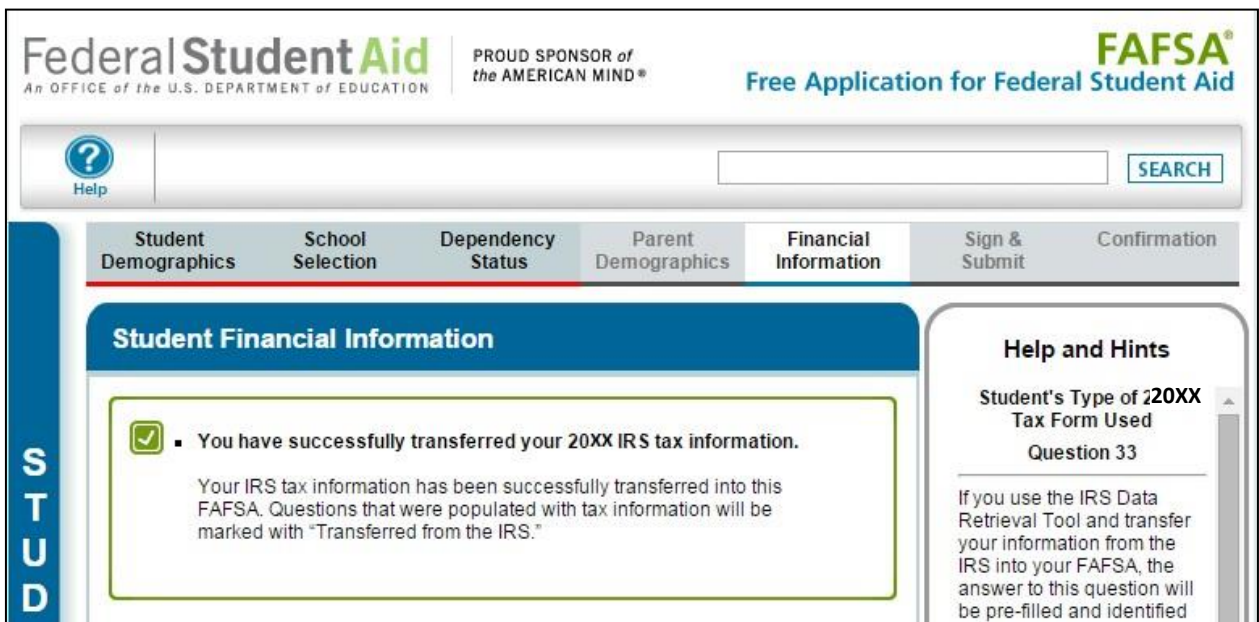


Figure 2-4

Step 3:

- You will be directed back to the FAFSA. It is important that you **do not change the financial information that was imported from the IRS**. On the top menu bar, click "Sign & Submit". (Figure 3-1)

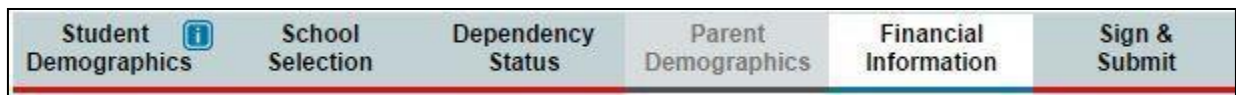


Figure 3-1

- Under the "Sign & Submit" page, you will be notified that you have made changes and that your application was saved (Figure 3-2). Click "Next" at the bottom of the page. (Figure 3-3)

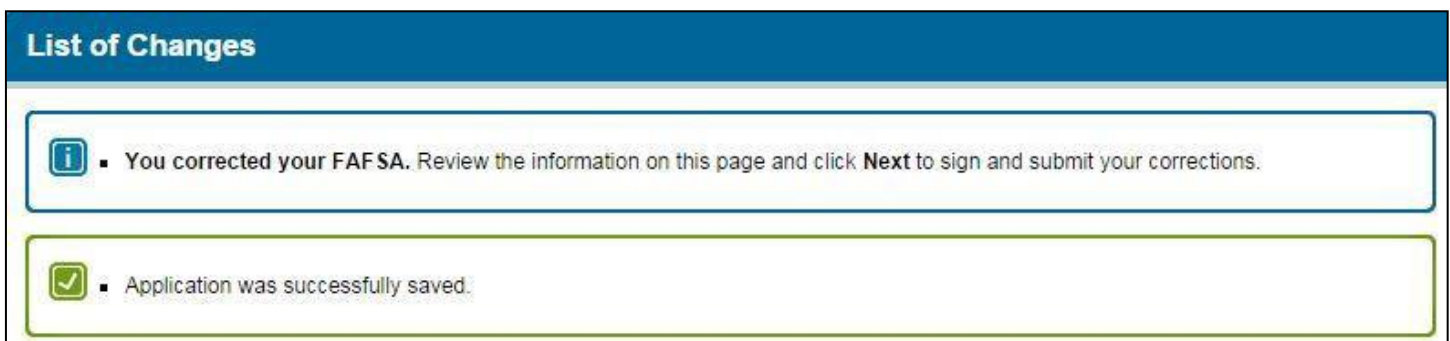


Figure 3-2



Figure 3-3

- In order for NCMC to receive your updated FAFSA you will need to "Sign & Submit" your FAFSA. Verify your information, read the terms, agree to the terms, click "sign" if you agree, and then click "Submit My FAFSA Now". (Figure 3-4)

Figure 3-4

You are finished!!!

Notes:

- Your FAFSA may take 3-5 days to arrive at NCMC.
- Once we receive your FAFSA we may contact you if we determine that additional documentation is needed.
- If you are having trouble logging into the IRS website to transfer your IRS information, you must contact the IRS to resolve your issue. The NCMC Office of Financial Aid cannot provide technical assistance for this website.
- If you are still having issues you may call the IRS to request a tax return transcript. Please visit the instructions on our verification page for details.