

Federal Student Aid and the Internal Revenue Service collaborated to develop a solution that simplifies FAFSA completion. The IRS Data Retrieval tool will allow Free Application for Federal Student Aid (FAFSA) on the web applicants to transfer their income and tax data from the IRS.

For the 2016-2017 academic year **ALL** FAFSA on the web applicants and parent s of dependent applicants who indicate they *have filed or will file* a 2015 Federal Tax return will be directed to use the IRS Data Retrieval Tool to report and/or update their income information on the FAFSA.

If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using the tool as it is an easy way to provide tax data and ensures FAFSA has accurate tax information. Please note, if you do not use the IRS Data Retrieval Tool to provide tax information, you may be required to obtain an official tax transcript from the IRS.

ELIGIBILITY

For 2016-2017, applicants filing an initial or renewal application or making a correction are eligible to use the IRS Data Retrieval Tool if he or she meets all of the following criteria:

- Must have valid SSN
- Must have filed a 2014 Federal Tax return
- Must have unchanged marital status since December 31, 2015

The following list represents who can not use the IRS Data Retrieval Tool for 2016-2017:

- Parents with all zeroes for SSN
- Any student or parent with a marital status date of January 1, 2015 or later
- Any student or parent who indicates they have not already filed a tax return or will not file a tax return
- A married independent applicant and spouse who filed separate tax returns
- Parents of a dependent student who filed separate tax returns
- The applicant, parent, or spouse, as applicable, who have filed an amended tax return

Parents/students who are unable or choose not to use the IRS Data Retrieval Tool can submit a IRS Tax Return Transcript to RWU. The Transcript is **not a photocopy of your Federal Income Tax return.**

TO ORDER THE IRS TAX RETURN TRANSCRIPT: To obtain an IRS Tax Return Transcript, go to www.irs.gov and click on the "Order a Return or Account Transcript" link. Make sure to order the **IRS Tax Return Transcript** and input requested information. Or you may request Tax Return Transcripts via automated phone by calling 800-908-9946. These forms will be mailed to your permanent home address as shown on your processed Federal Tax Return. IRS Tax Return Transcript can also be requested in-person at your local IRS Office. There is no charge for the IRS Tax Return Transcript.

FILERS NEED:

- A valid SSN
- If you submitted electronic tax returns to the IRS, wait 2 weeks before retrieving them
- If you submitted paper tax returns to the IRS, wait 6-8 weeks before retrieving them

Instructions for using the IRS Data Retrieval Tool

Follow these steps if you did not originally request IRS Data Retrieval transfer to your FAFSA.

1. Log into your FAFSA at www.FAFSA.ed.gov and click on “Start Here” – if already completed and making corrections click on “make Corrections to a Processed FAFSA” after you sign in.



2. Enter all required information. The IRS Data Retrieval Tool will appear at the “Financial Information” section of the FAFSA

 The image shows the FAFSA application process. The top navigation bar includes "Contact Us" and "Browse Help". Below this is a horizontal menu with tabs: "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Financial Information" tab is highlighted with a red arrow. Below the tabs is the "Student Demographic Information" section, which includes fields for "Your last name", "Your first name", and "Your middle initial". To the right is a "Help and Hints" section with the text "Student's First Name Question 2".

3. You will be prompted to answer “For 2014, have your parents completed their IRS income tax return or another tax return?” There is a drop down box that will allow you to pick one of three options: already completed, will file or not going to file.

 The image shows the FAFSA application process, specifically the "Parent Tax Information" section. The top navigation bar is the same as in the previous screenshot. Below the tabs, the "Parent Tax Information" section is active. It features a green checkmark icon and the text "Application was successfully saved." Below this is a question: "For 2012, have your parents completed their IRS income tax return or another tax return?". A dropdown menu is open, showing three options: "Select", "Already completed", and "Will file". To the right of the dropdown are "PREVIOUS" and "NEXT" buttons. At the bottom of the section are buttons for "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT". To the right of the main section is a "Help and Hints" section with the text "Parents Filed 2012 Income Tax Return? Question 79" and a paragraph explaining the question.

If you select one of the following responses:

- Married Filing Separately
- Head of Household
- Amended tax return
- A Puerto Rican or foreign tax return

You will get a response of *“Based on your response, you are not eligible to transfer your information from the IRS into the FAFSA.”*

If you select:

- You, the parents, recently filed taxes

You will get a response of *“If you filed your taxes electronically within the last 2 weeks or if you filed your taxes by mail within the last 8 weeks, your tax information may not be available yet from the IRS. You can determine if you should attempt to access your tax information from the IRS at this time.”*

If you select:

- None of the above

You will get a response of *“Based on your response, we recommend that you transfer your information from the IRS into this FAFSA.”*

You will then be prompted to select a parent and enter their respective PIN number. Then click [LINK TO IRS](#)

The screenshot shows the FAFSA website interface. At the top, there is a checkbox labeled "None of the above" which is checked. Below this, a message states: "Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA. Enter your PIN and click Link To IRS." There are two input fields: "Which parent are you?" with a dropdown menu showing "Select", and "What is your PIN?" with a text box. Below the PIN field are two links: "Apply For A PIN" and "I Forget/Don't Know My PIN". A green button labeled "LINK TO IRS" is highlighted. To the right of the main form, there is a sidebar with the text: "Select the option that indicates your parents' 2012 income tax return filing status:". At the bottom of the form, there are buttons for "PREVIOUS" and "NEXT". At the very bottom of the page, there are buttons for "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT".

Your FAFSA will then be saved and a site exit message will display.



4. Enter all required information on the IRS website.

Once the IRS validates your identification your IRS tax information will display. You will then be given the option to transfer your information or return to the FAFSA where you will be asked to manually enter your information. *If your FAFSA is chosen for verification and you or your parent chooses not to use the IRS data retrieval process or did retrieve IRS data and subsequently manually change it, you must provide your IRS Tax Return Transcript obtained directly from the IRS. We can no longer accept photocopies of Federal Tax Returns.*

5. After clicking **TRANSFER NOW** you will get a response that reads “You have successfully transferred your 2014 tax information.”

The data that will be retrieved, if applicable include:

- Adjusted gross income
- Taxes paid
- Number of exemptions
- Education credits
- Untaxed portion of IRA distributions and pensions

The following information will not be retrieved and must be manually added to the FAFSA, if applicable:

- Earned income (Box 1 on W-2 statements)
- Self-employment income
- Earned income from partnerships
- Payments to tax-deferred pensions
- Child support received or paid

6. You are NOT DONE!!! Be sure to complete the sign and submit section and electronically sign with your PIN numbers. You are not finished until you have received a confirmation number and Expected Family Contribution (EFC) number.