



## IRS Data Retrieval Tool Instructions

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The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of *FAFSA on the Web* at [www.fafsa.gov](http://www.fafsa.gov). Financial aid applicants selected for verification by the federal processor will be required to link their FAFSA with their IRS data using the IRS DRT or submit a Tax Return Transcript. IRS data is available for linking 2-3 weeks after filing taxes if you file electronically, or 8-11 weeks after filing taxes if you submit a paper copy of your tax return to the IRS. It is important not to change information that was transferred into the student's FAFSA using the IRS DRT. Students should monitor their FinAid Status account at <http://FAStatus.trincoll.edu> to determine if the IRS DRT or other documentation is required for their file.

*The following instructions assume you have already submitted a FAFSA and are meant to help you update your FAFSA application using the IRS Data Retrieval Tool.*

1. Log onto your FAFSA application at [www.fafsa.gov](http://www.fafsa.gov).

### Returning User?

- Make a correction
- Add a school
- View your Student Aid Report (SAR), and more...

Login

- To log in, you will need your FSA ID or student information.

2. Once logged in, click on "**Make FAFSA Corrections**" to bring up the FAFSA information for the current aid year.

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You can also:

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

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- You will need to create a Save Key for these changes.

**Create a Save Key.**

The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

Create a Save Key

Re-enter Save Key

**NEXT** 

3. Once on the Introduction Page, click "**Next**".

**Introduction Page - 2013-2014 Correction**

Use the **Next** and **Previous** buttons to move from page to page in the form. If you use your browser's back and forward buttons to move from page to page, you may lose your data.

[Making corrections to a processed FAFSA](#)


[How many steps does it take to complete?](#)

[How can I get help correcting my FAFSA?](#)

[Can I save my FAFSA if I can't finish it?](#)

[Signing the FAFSA](#)

[FAFSA on the Web Security and Privacy](#)

**NEXT** 

**EXIT**

4. On the **Financial Information Tab**, update your answer to **“Already Completed.”** Options will appear to help you decipher whether or not you will be able to use the IRS Data Retrieval Tool (see screen shot below).

The screenshot shows the FAFSA Financial Information tab. The 'Student Tax Information' section is active. A message at the top states 'Application was successfully saved.' Below this, the question 'For 2012, have you completed your IRS income tax return or another tax return?' has 'Already completed' selected in a dropdown menu. A note indicates that users who answer 'No' may be able to use the IRS Data Retrieval Tool. Below the question are five sub-questions with radio button options for 'Yes' or 'No':

- Did you or your spouse file as Married Filing Separately? (Yes/No)
- Did you or your spouse file as Head of Household? (Yes/No)
- Did you file an 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 8 weeks)? (Yes/No)

Navigation buttons include 'PREVIOUS', 'NEXT', 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. A 'Help and Hints' sidebar on the right provides instructions for Question 32 regarding the 2012 tax return status.

NOTE: If you answer YES to any of the questions, you will not be able to use the IRS Data Retrieval Tool at this time. Please see the bullets below for instructions on how to proceed.

- If you answered YES to: "Married Filing Separately", "Head of Household", or "Amended Tax Return (1040X)", you will not be able to use the IRS Data Retrieval Tool. Instead, you must request a "Tax Return Transcript" from the IRS and submit it to the Financial Aid Office. Do not delay! It may take the IRS several weeks to process your request. For information regarding this process, click [here](#).
- If you answered YES to filing a "Puerto Rican or Foreign Tax Return", please submit copies of those forms to the Financial Aid Office.
- If you answered YES to filing your "taxes electronically in the last 3 weeks (or by mail in the last 8 weeks)" your tax information may not be available yet from the IRS. You may need to wait until the IRS Data Retrieval function becomes available to you. Also, if you owe the IRS any payment of taxes, the IRS Data Retrieval Tool will not be available to you until a few weeks after your payment has been received by the IRS.

5. If you can answer NO to each of the questions, you should be able to complete the IRS Data Retrieval Tool. Click **"LINK TO IRS"**. You will be alerted that you are leaving the FAFSA on the Web. Click **"OK"**.

6. The IRS website will open to a page entitled "Get My Federal Income Tax Information". Enter your filing status and address information exactly as it appears on your 1040 and press "Submit". (This tool is very sensitive. The information you enter must exactly match your 1040! For example, if on the address line of your 1040 you used the "St." abbreviation, but you typed the word "Street" into this website, the IRS Data Retrieval Tool cannot match you. Check your 1040 and try again.)

7. If your address was entered correctly, your federal income tax information will populate. Check the box labeled "Transfer My Tax Information into the FAFSA" and then click "Transfer Now" (see screen shot below).

The screenshot shows the IRS website interface for transferring tax information to the FAFSA. At the top, there are links for 'Return to FAFSA', 'Log Out', and 'Help', along with the IRS logo and 'Español' language option. The main heading is 'Student 2012 Federal Income Tax Information'. Below this, a note states: '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	2012	
Name(s)	[REDACTED]	
Social Security Number	[REDACTED]	
Filing Status	Married-Filed Joint Return	
Type of Tax Return Filed	1040A	Question 33 on the FAFSA
Adjusted Gross Income	\$32,376	Question 35 on the FAFSA
Income Earned From Work ?	\$32,376	Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Student: Question 38 on the FAFSA and/or Spouse: Question 39 on the FAFSA
Income Tax	\$0	Question 36 on the FAFSA
IRS Exemptions	2	Question 37 on the FAFSA
Education Credits	\$1,288	Question 43a on the FAFSA
IRA Deductions and Payments	\$0	Question 44b on the FAFSA
Tax-Exempt Interest Income	\$0	Question 44d on the FAFSA
Untaxed IRA Distributions ?	\$0	Question 44e on the FAFSA
Untaxed Pensions ?	\$0	Question 44f 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](#) ?

8. Your session with the IRS will close and your information will be transferred into the FAFSA (see screen shot below). **Though your information has been transferred successfully, Trinity will not receive the updates unless you continue through to Sign & Submit the FAFSA again.** Continue through the FAFSA and complete any blank fields but **be careful NOT to change any prepopulated value labeled as "Transferred from the IRS"**. If you change any value that is labeled as such, you will be required to complete the IRS Data Retrieval Tool again.

- If both the student and parent filed tax returns, repeat the process so that both parent and student IRS data is transferred.

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
STUDENT	<h3>Student Financial Information</h3> <div style="border: 1px solid green; padding: 5px; margin-bottom: 10px;"> <input checked="" type="checkbox"/> <b>You have successfully transferred your 2012 IRS tax information.</b>            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."         </div> <p>What income tax return did you file for 2012?  <input type="text" value="Transferred from the IRS"/> </p> <p>What was your (and your spouse's) adjusted gross income for 2012?            \$32,376.00 <b>Transferred from the IRS</b> </p> <p>How much did you earn from working (wages, salaries, tips, etc.) in 2012?            \$ <input type="text" value=""/>.00         </p> <p>How much did your spouse earn from working (wages, salaries, tips, etc.) in 2012?            \$ <input type="text" value=""/>.00         </p> <p>As of today, are you (or your spouse) a dislocated worker?  <input type="text" value="Select"/> </p> <p style="text-align: center;"> <input type="button" value="PREVIOUS"/> <input type="button" value="NEXT"/> </p>				<h3>Help and Hints</h3> <p><b>Student's Type of 2012 Tax Form Used</b> Question 33</p> <p>If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."</p> <p>If the answer to this question is not pre-filled, you must select the income tax return that you filed or will file for 2012:</p> <ul style="list-style-type: none"> <li>• IRS 1040</li> <li>• IRS 1040A or 1040EZ</li> <li>• A foreign tax return</li> <li>• A tax return for a U.S. territory or a Freely</li> </ul>	
	<input type="button" value="NEED HELP?"/> <input type="button" value="SAVE"/> <input type="button" value="CLEAR ALL DATA"/> <input type="button" value="VIEW FAFSA SUMMARY"/> <input type="button" value="EXIT"/>					

9. Proceed through to the **Sign & Submit Tab** of the FAFSA and choose **"Submit My FAFSA Now"** (see screen shot below). This action will send your changes to Trinity. You will know your FAFSA has been submitted successfully when you arrive at the Confirmation Page.

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
<h3>Sign &amp; Submit</h3> <p><input type="button" value="VIEW OR PRINT YOUR FAFSA INFORMATION"/></p> <p>Are you a preparer?  <input type="radio"/> Yes <input checked="" type="radio"/> No         </p> <p><b>Student Signature</b>            APPLICATION SIGNED BY STUDENT  <b>READ BEFORE PROCEEDING</b>            By signing this application electronically using your Federal Student Aid PIN or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:         </p> <ol style="list-style-type: none"> <li>1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,</li> <li>2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,</li> <li>3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,</li> <li>4. will notify your school if you default on a federal student loan, and</li> <li>5. will not receive a Federal Pell Grant from more than one school for the same</li> </ol> <p>Terms of Agreement - Student  <input checked="" type="radio"/> Agree <input type="radio"/> Disagree         </p> <p style="text-align: center;"> <input type="button" value="PREVIOUS"/> <input type="button" value="SUBMIT MY FAFSA NOW"/> </p>					<h3>Help and Hints</h3> <p><b>Are you a preparer?</b></p> <p>A preparer is anyone who charges a fee for helping you fill out your FAFSA.</p> <p>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.</p> <p>If you are a preparer, select <b>Yes</b>.</p>	
<input type="button" value="NEED HELP?"/> <input type="button" value="SAVE"/> <input type="button" value="CLEAR ALL DATA"/> <input type="button" value="VIEW FAFSA SUMMARY"/> <input type="button" value="EXIT"/>						

**Congratulations, you have now completed the IRS Data Retrieval Tool!**