

2012-2013 FAFSA

IRS Data Retrieval Process

Officials in the Office of Federal Student Aid and the Internal Revenue Service have worked together to develop a process to simplify the steps that families must take each year to complete the **Free Application for Federal Student Aid ("FAFSA")**. Federal Student Aid staff has redesigned the "FAFSA on the Web" site to simplify the application process for applicants.

The benefit (to families) of utilizing the IRS Data Retrieval Process is that it will greatly simplify and expedite the verification process. You will no longer have to submit complete copies of your federal tax returns to our office before we can finalize your federal aid eligibility.

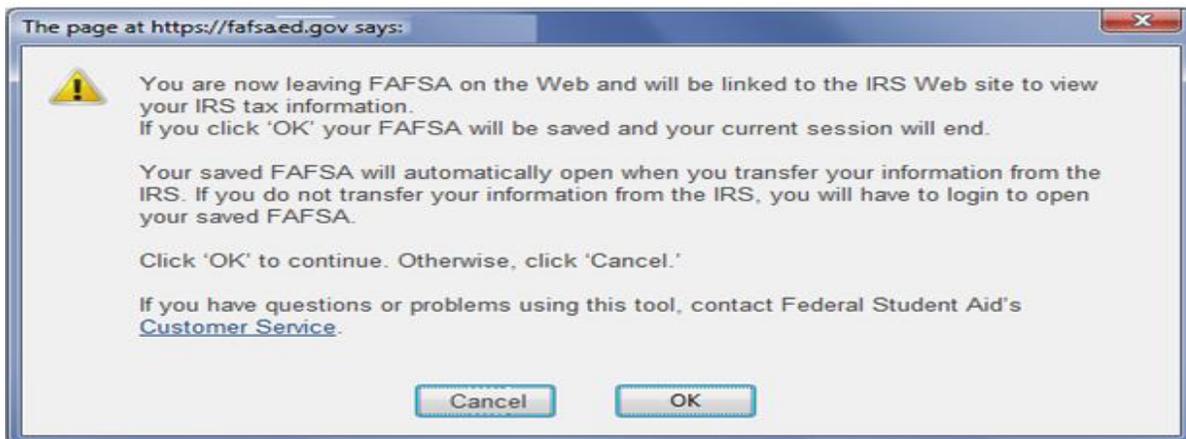
The "IRS Data Retrieval" process for the 2012-2013 academic year is scheduled to be available starting February 1, 2012.

- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after the return has been filed,
- Data from paper tax returns will be available in 6-8 weeks.

All **2012-2013 FAFSA On The Web** applicants, and the parents of dependent applicants, who indicate that they have filed their federal tax returns prior to completing their FAFSA and who are otherwise eligible will be directed to use the FAFSA-IRS Data Retrieval process to complete their FAFSA more easily and accurately.

Applicants who chose not to use the FAFSA-IRS Data Retrieval process, or who retrieve IRS data but subsequently change it, will be informed that they will need to explain to their institutions why information they provided is more accurate than the information that would have been obtained directly from the IRS. **They will need to provide information obtained directly from the IRS.**

Families **must actively choose** to utilize the data retrieval tool. If they choose to do so, they will be transferred to the Internal Revenue Service web site.



Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information as it appears on your <2008> Federal Income Tax Return. ?

Required fields*

First Name*	Joe
Last Name*	Smith
Social Security Number*	***-**-6789
Date of Birth*	01 / 04 / 1990
Address* ? P.O. Box and/or Street Address	
Apt. Number (Required if it appears on your tax return)	
Country*	United States
City, Town or Post Office*	
State/ U.S. Territory*	Select One
ZIP Code*	
Filing Status*	Select One

Submit

Applicants will need to authenticate their identity before any personal information is displayed.

Parent <YYYY> 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	<2008>	
Name (s)	<Joe & Jane Smith>	
Social Security Number	<***-**-6789>	
Filing Status	<Married-Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question <##> on the FAFSA
Adjusted Gross Income	<\$126,721>	Question <##> on the FAFSA
Income Tax	<\$31,400>	Question <##> on the FAFSA
IRS Exemptions	<5>	Question <##> on the FAFSA
Education Credits	<\$2,500>	Question <##> on the FAFSA
IRA Deductions and Payments	<\$2,500>	Question <##> on the FAFSA
Tax-Exempt Interest Income	<\$2,500>	Question <##> on the FAFSA
Untaxed IRA Distributions ?	<-\$2,500>	Question <##> on the FAFSA
Untaxed Pensions ?	<-\$2,500>	Question <##> 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 ?

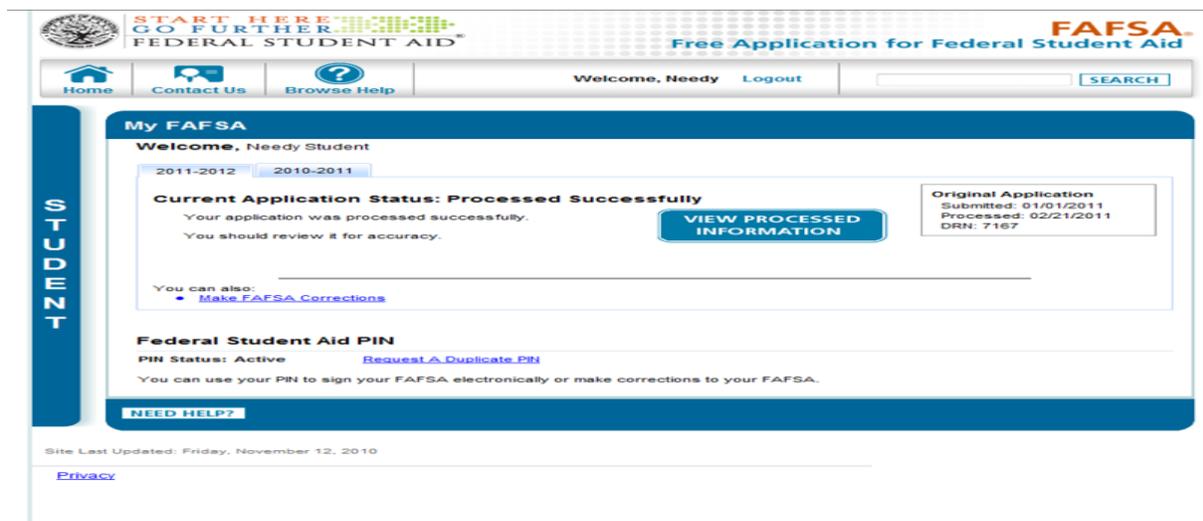
Tax data will be presented and the applicant will have the option to "Transfer" the tax information to the FAFSA. Applicants can also choose NOT to transfer the data to the FAFSA. Transferred data will have a notation - "Transferred from the IRS".

FAFSA Corrections

We know that many students/parents will not have their federal tax returns completed by the priority application deadline of February 15, 2012. These families can use "estimated income" information on the initial FAFSA. These families will be able to use this process once their tax returns are completed.

Using emails and other communications, starting around April 1, 2012, Federal Student Aid will remind applicants that once they have filed their income tax return they should use the FAFSA corrections process to update their FAFSA using the FAFSA-IRS Data Retrieval process. Subsequent messages will be sent every 45 days until mid-September then every 60 days until the end of the processing cycle.

- Click on the link in the middle of the page "Make FAFSA Corrections"



The screenshot shows the FAFSA website interface. At the top, there is a navigation bar with links for Home, Contact Us, and Browse Help. The main content area is titled "My FAFSA" and includes a welcome message for a "Needy Student". The current application status is "Processed Successfully", and a "VIEW PROCESSED INFORMATION" button is visible. A link for "Make FAFSA Corrections" is highlighted in blue. The page also displays the Federal Student Aid PIN status as "Active" and provides a link to "Request A Duplicate PIN". A "NEED HELP?" button is located at the bottom of the main content area. The footer includes the text "Site Last Updated: Friday, November 12, 2010" and a "Privacy" link.

When the IRS Data Retrieval Tool cannot be used:

- A married independent applicant and spouse who filed separate tax returns;
- When the parents of a dependent student filed separate tax returns.
- An applicant or applicant's parent who have had a change in marital status after the end of the tax year on December 31, 2011.
- The applicant, or parent or spouses, as applicable, who have filed an amended tax return.

In general, all applicants who have already filed but elect to not use the retrieval process will be subject to being selected for verification based upon the risk they pose to federal funds and, if they are selected, will be required to support their reported FAFSA data with information obtained directly from the IRS.