

For the 2015-2016 award year, the IRS Data Retrieval Tool is available for online FAFSA submittals and is accessible through the FAFSA web site www.fafsa.ed.gov. In lieu of submitting tax return transcripts, the retrieval tool allows FAFSA applicants and their parents the ability to transfer their 2014 income tax information from the IRS to the FAFSA.

BENEFITS OF USING THE TOOL:

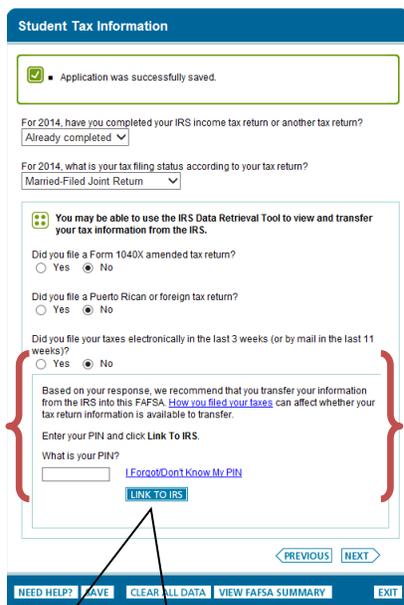
- Applicants can complete their FAFSA more easily and accurately!
- The tool will increase the accuracy in the awarding for student financial aid funds!
- Applicants selected for verification can use the tool to update their income information and avoid unnecessary processing delays!

WHO IS “NOT” ELIGIBLE TO USE THE TOOL?

- Married couples who file separate tax returns.
- Applicants whose marital status has changed as of January 1st, 2015
- Applicants who are neither eligible nor required to file a 2014 Federal Tax Return.
- Parents with zeros for Social Security numbers.
- Applicants that indicated that they have not already filed.
- Student or Parent filing an amended tax return.
- Student or Parent who filed a foreign (or Puerto Rico) tax return.

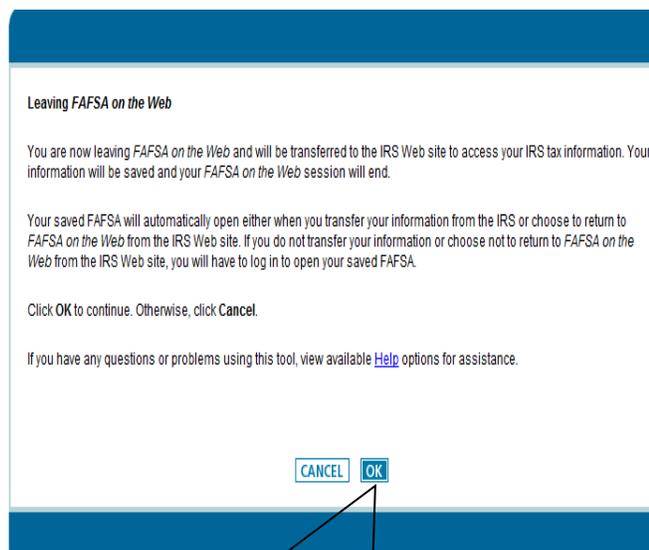
How to Use the IRS Data Retrieval Tool

1.



To use the IRS retrieval tool, answer these questions on your FAFSA on the web. Select “LINK TO IRS”

2.



Once you select “LINK TO IRS”, you will get this box. Select “OK”

Continued next page

3. **Get My Federal Income Tax Information**

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

Enter the following information from your 2014 Federal Income Tax Return. ? Required fields *

First Name *	Jane
Last Name *	Doe
Social Security Number *	***-**-****
Date of Birth *	05 / 09 / 1970
Filing Status * ?	Select One
Address - Must match your 2014 Federal Income Tax Return. ?	
Street Address *	
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	
Country *	United States
City, Town or Post Office *	
State/U.S. Territory *	Select One
ZIP Code *	

Select the button below to exit the IRS system and return to your 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.

Return to FAFSA Submit

This information **must** match the information on your and your Parents' tax return exactly.

4. **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 ?

Your (or your parent's) tax information will appear. To complete Data transfer, click the box next to "Transfer My Tax Information into the FAFSA" and then click on "Transfer Now"

5. **Sign & Submit**

Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a preparator?
 Yes No

Student Signature

Students Social Security Number

Students last name

Students date of birth

What is your (the student's) PIN?
[I Forget/Don't Know My PIN](#) SIGN

[Other options to sign and submit](#)

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

- will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education.
- are not in default on a federal student loan or have made satisfactory arrangements to repay it.
- do not owe money back on a federal student grant or have made satisfactory arrangements to repay it.

Terms of Agreement - Student
 Agree Disagree

[PREVIOUS](#) [SUBMIT MY FAFSA NOW](#)

NEED HELP? [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

You will receive a confirmation that the data transferred and you will then see this on your screen. After you have read the Terms of Agreement, Click "Agree", and then click on "SUBMIT MY FAFSA NOW"

Please note: If you are selected for verification after your FAFSA has been processed, we will notify you of the documents you will need to submit to the Financial Aid Office. Using the IRS data retrieval tool does not eliminate the verification process or your responsibility to submit the requested verification forms.

HOW TO OBTAIN A FREE TRANSCRIPT FROM THE IRS:

If your FAFSA is selected for verification and you did not use the IRS retrieval process or you changed your IRS data, you will be required to request a Tax Return Transcript directly from the IRS. Personal copies of federal tax returns can no longer be accepted by CSU for verification purposes.

There are three ways to obtain an IRS Tax Return Transcript:

- **View and Print an IRS Tax Return Transcript Immediately:** at <http://www.irs.gov/Individuals/Get-Transcript>
- **Get Transcript by Mail:** Mail the completed IRS Form 4506T to the appropriate address provided on page 2 of Form 4506T, OR at <http://www.irs.gov/Individuals/Get-Transcript> and select the "Get Transcript by Mail" option.
- **In Person:** Visit your local IRS office at 1240 E. Ninth Street, Cleveland, OH