

For the 2014-2015 award year, the IRS Data Retrieval Tool is available for online FAFSA submittals and is accessible through the FAFSA web site www.fafsa.gov. In lieu of submitting tax return transcripts, the retrieval tool allows FAFSA applicants and their parents the ability to transfer their 2013 income tax information from the IRS to the FAFSA.

BENEFITS OF USING THE TOOL:

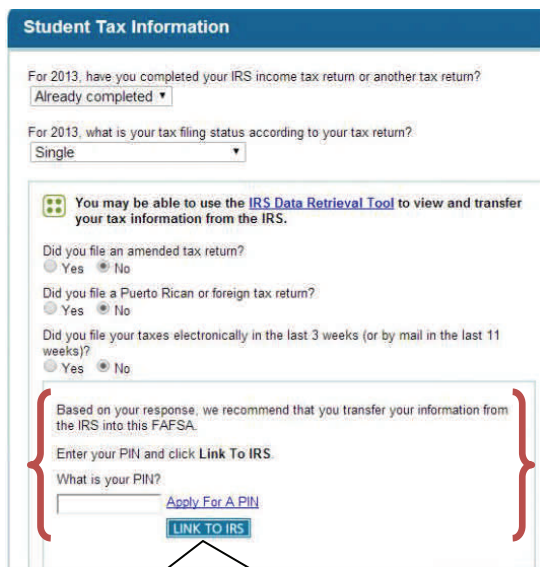
- Applicants can complete their FAFSA more easily and accurately!
- The tool will increase the accuracy in the awarding for student financial aid funds!
- Applicants selected for verification can use the tool to update their income information and avoid unnecessary processing delays!

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, 2014
- Applicants who are neither eligible nor required to file a 2013 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.

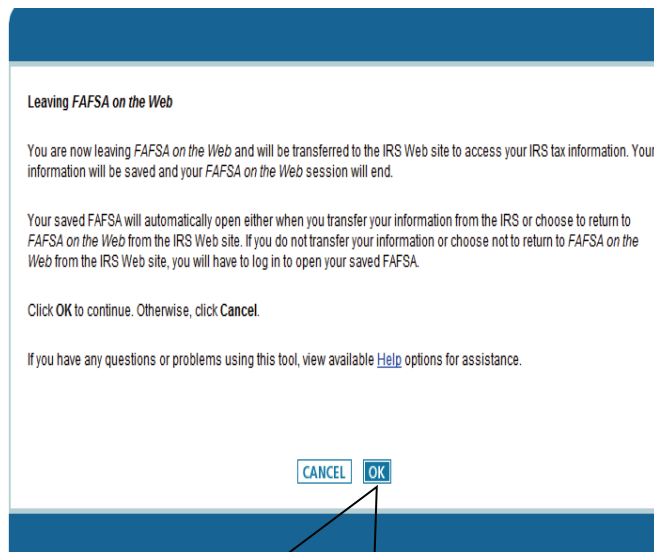
How to Use the IRS Data Retrieval Tool

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”

3. Internal Revenue Service
United States Department of the Treasury

Get My Federal Income Tax Information

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

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

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

4. IRS.gov

Parent <YYYY> Federal Income Tax Information

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>
Adjusted Gross Income	<\$126,721>
Income Tax	<\$11,400>
IRS Exemptions	<5>
Education Credits	<\$2,500>
IRA Deductions and Payments	<\$2,500>
Tax-Exempt Interest Income	<\$2,500>
Untaxed IRA Distributions	<-\$2,500>
Untaxed Pensions	<-\$2,500>

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. START HERE GO FURTHER FEDERAL STUDENT AID FAFSA Free Application for Federal Student Aid

Sign & Submit

VIEW OR PRINT YOUR FAFSA INFORMATION

Are you a parent?
 Yes No

APPLICATION SIGNED BY STUDENT

READ BEFORE PROCEEDING

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:

- 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

SUBMIT MY FAFSA NOW

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 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 44199