

# FAFSA and IRS Data Retrieval Process

## 2012-2013

### Overview

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")**.

**Remember Moraine Park's priority date to apply for financial aid is April 15, 2012!**

Federal Student Aid staff have redesigned the "FAFSA on the Web" site to simplify the application process for applicants.

**START HERE GO FURTHER FEDERAL STUDENT AID™**

**FAFSA**  
Free Application for Federal Student Aid

HOME ABOUT US STUDENT AID ON THE WEB PIN SITE CONTACT US BROWSE HELP Search English | Español

**Get help paying for college**  
Submit a free application for federal student aid (FAFSA)

**Start Here**

- Start or continue your FAFSA
- Correct your FAFSA
- Check the status of your FAFSA, and more...

**Deadlines**  
Information about your deadlines.

**School Code Search**  
Find your college's school code. Also find detailed information about your college.

**FAFSA Filing Options**  
Learn about the other options for filing your FAFSA.

**Announcements**

- The new 2011-2012 FAFSA is here! To begin your application, click **Start Here** above.

**Thinking About College?**

Use FAFSA4caster to see how federal student aid can help you pay for college!

Watch real students share why they are going to college.

Site Last Updated: Sunday, May 30, 2010

FOIA | Privacy | Security | Notices

WhiteHouse.gov | USA.gov | ED.gov

The FAFSA is now linked to the Internal Revenue Service (IRS). Students and parents applying for financial aid can access their tax information directly from the FAFSA website. This is called the IRS Data Retrieval Process.

The Department of Education randomly selects a certain percentage of applications each year for schools to verify that the data provided on the FAFSA application is accurate. This is called the verification process.

**The benefit (to families) of utilizing the IRS Data Retrieval Process is that it will greatly simplify and expedite the verification process. If you use the IRS Data Retrieval Process when completing the FAFSA, 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.**

# How IRS Data Retrieval Will Work on the 2012-2013 FAFSA

The "IRS Data Retrieval" process for the 2012-2013 academic year is tentatively 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.**

In general, all applicants who have already filed but elect to not use the retrieval process may 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.

START HERE GO FURTHER FEDERAL STUDENT AID™

FAFSA Free Application for Federal Student Aid

Contact Us Browse Help SEARCH

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**PARENT**

**Parent Tax Information**

Application was successfully saved.

For 2010, have your parents completed their IRS income tax return or another tax return?  
 Already completed ▾

**View and Transfer your 2010 Tax Information from the IRS.** [How it works](#)  
 You, the parent, may link to the IRS and view your 2010 tax information. You will also have the option to securely transfer your information into this FAFSA.

**Note:** If you recently filed your taxes, your IRS information may not be available yet. If you filed your taxes electronically, it may take 1-2 weeks; but if you filed your taxes via the mail it may take 6-8 weeks. You can use your personal copies of your tax returns and complete the FAFSA. You could also wait until your IRS information becomes available before submitting your FAFSA, but you should keep in mind any [deadlines](#).

Enter your PIN and click **Link To IRS**.

Which parent are you?

Click **Skip This Option** if you do not want to use this tool.

If your 2010 IRS tax filing status is [married filing separately](#), you filed an [amended tax return](#), or you filed a [foreign tax return](#), we recommend that you **Skip This Option**.

**Help and Hints**

**Which parent are you?**

This question is used to determine which parent is providing a PIN in order to access the IRS Web site.

- Select **Father / Stepfather** if you are the student's father / stepfather.
- Select **Mother / Stepmother** if you are the student's mother / stepmother.

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

Applicants will need to authenticate their identity before any person 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"**

Remember,

- 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.

## FAFSA Corrections

We know that students and parents may not have their federal tax returns completed by Moraine Park's priority application deadline of April 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 the FAFSA logo and the text "Free Application for Federal Student Aid". Below the navigation bar, there are links for "Home", "Contact Us", and "Browse Help". The main content area is titled "My FAFSA" and includes a "Welcome, Needy Student" message. The current application status is "Processed Successfully", and the user is advised to review it for accuracy. A "VIEW PROCESSED INFORMATION" button is visible. The original application details are: Submitted: 01/01/2011, Processed: 02/21/2011, DRN: 7167. A "NEED HELP?" button is located at the bottom of the main content area. The site last updated date is Friday, November 12, 2010, and a "Privacy" link is provided at the bottom.

## ***Some Students Will Not Be Able to Use This Tool***

- 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 spouse, as applicable, who have filed an amended tax return.

will not be able to use the IRS Data Retrieval Process.