



# IRS Data Retrieval Tool 2017-18



**CASH FOR C//LLEGE**



California  
Student Aid Commission

 **Edvisors**<sup>®</sup>

# IRS Data Retrieval



- This question asks if parents have completed their 2015 IRS income tax return
- If parent(s) answer “Already completed,” they will be given the option to transfer their 2015 income tax information directly from IRS records to the FOTW
- If parents indicate that they have recently filed their 2015 taxes, they may not be able to access their IRS data if they have filed taxes electronically within the last three weeks or by mail within the last eleven weeks
- Instead, they should use their actual 2015 IRS tax return to complete the FOTW so the student does not miss any important financial aid deadlines

**Parent Tax Information**

Application was successfully saved.

For 2015, have your parents completed their IRS income tax return or another tax return?  
Already completed ▾

For 2015, what is your parents' tax filing status according to their tax return?  
Married-Filed Joint Return ▾

You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.

Did you, the parents, file a Form 1040X amended tax return?  
 Yes  No

Did you, the parents, file a Puerto Rican or foreign tax return?  
 Yes  No

Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?  
 Yes  No

# IRS Data Retrieval (continued)



Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

Which parent are you?

What is your (the parent's) FSA ID?

FSA ID Username or Verified E-mail Address

FSA ID Password

[Create an FSA ID](#)  
[Forgot Username](#)  
[Forgot Password](#)

**LINK TO IRS**



# IRS Data Retrieval (continued)

## Leaving *FAFSA on the Web*

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your information will be saved and your *FAFSA on the Web* session will end.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.

Click **OK** to continue. Otherwise, click **Cancel**.

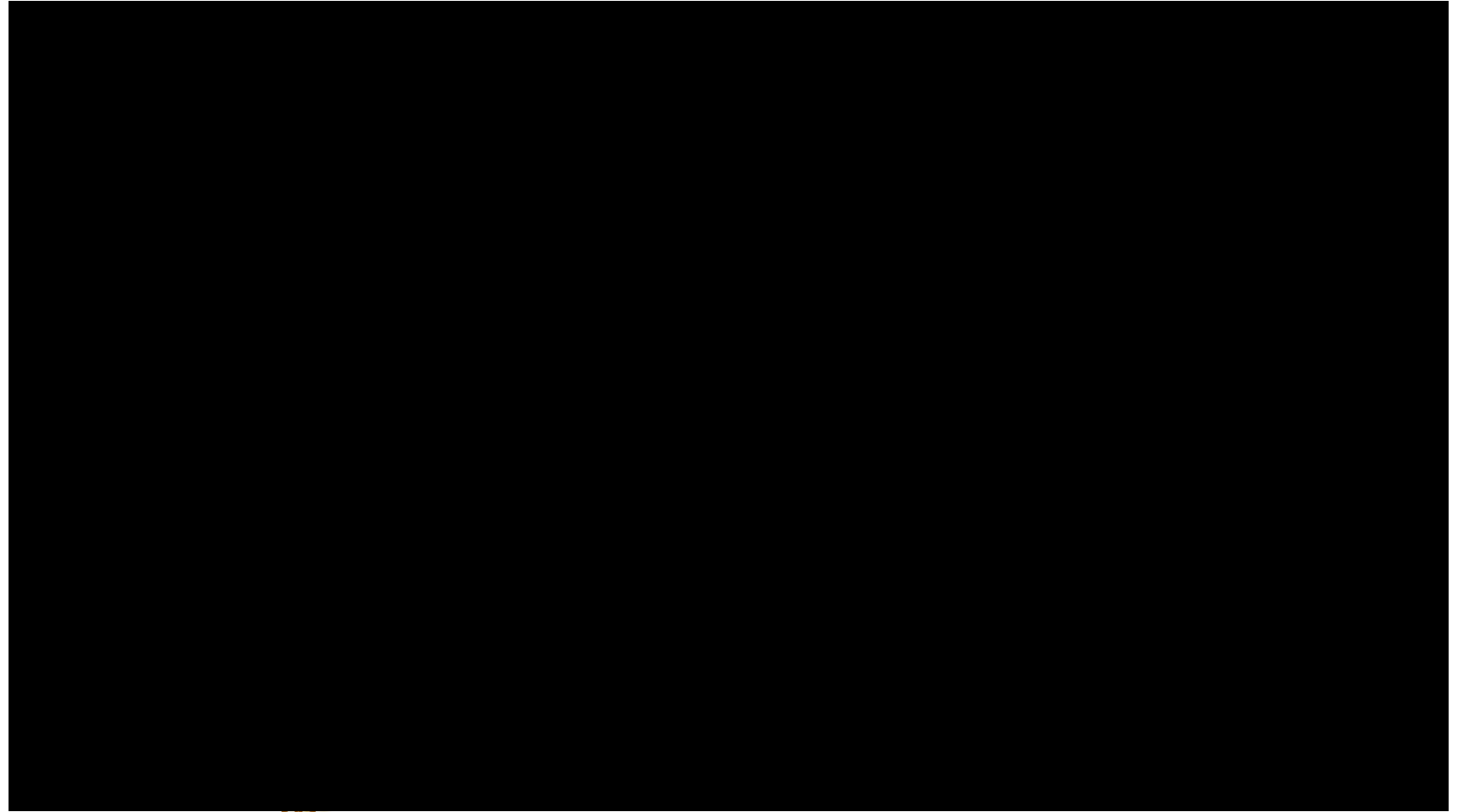
If you have any questions or problems using this tool, view available [Help](#) options for assistance.

CANCEL

OK



# IRS Data Retrieval Tool



California  
Student Aid Commission



# IRS Data Retrieval Tool

<https://www.youtube.com/watch?v=eiNkqyCluro>



**CASH FOR COLLEGE**



California  
Student Aid Commission



**Edvisors**<sup>®</sup>

# IRS Tax Transcript

**Order your free IRS Tax Return Transcript at [www.irs.gov/individual/get-transcript](http://www.irs.gov/individual/get-transcript)**



- If you can't use the IRS Data Retrieval Tool, you may be required to provide an IRS Tax Return Transcript if selected for verification
- The online tax return transcript is preferred because it can be emailed to the college, but getting it requires more information
- A credit card account number of the account number from a loan
- A mobile phone number registered to you
- Otherwise, you will need to obtain a tax return transcript by mail sent to the address on your income tax return