

FAFSA IRS Data Retrieval

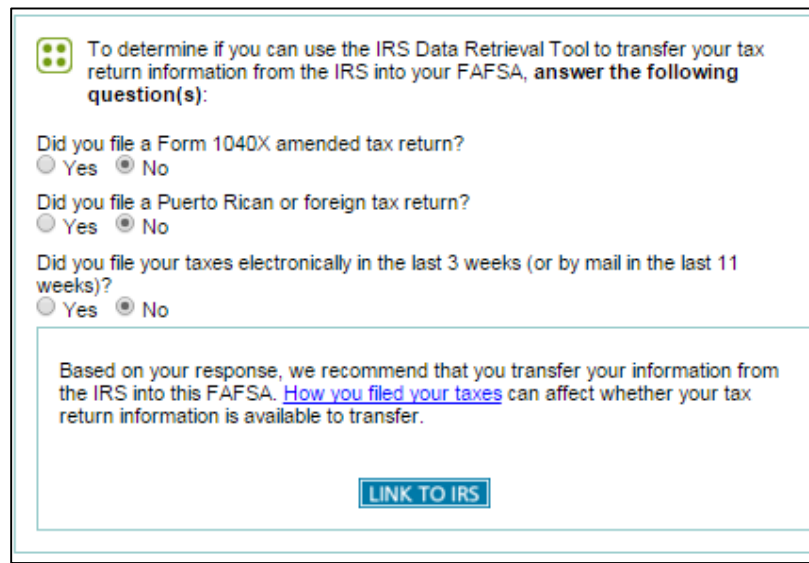
Step 1:


- Sign into the FAFSA and on the homepage select that you wish to "Make A Correction to an Existing FAFSA." Select the appropriate year.
- Once you are inside the FAFSA, select "Financial Information" on the menu bar. (Figure 1-1)



Figure 1-1

- On the Financial Information page, answer the IRS Data Retrieval Tool questions appropriately. If the IRS determines you are eligible, you can perform the Data Retrieval. Click on the "Link to IRS" button. (Figure 1-2)



 To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):

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

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

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

Based on your response, we recommend that you 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.

[LINK TO IRS](#)

Figure 1-2

- You will be taken to a page that will inform you that you will be leaving the FAFSA. Click "OK" to continue. (Figure 1-4)

The screenshot shows the FAFSA application interface. At the top, there is a navigation bar with tabs for "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Financial Information" tab is currently selected. Below the navigation bar, there is a "Help" button and a search box. The main content area displays a message titled "Leaving FAFSA on the Web". The message informs the user that they are being transferred to the IRS website to access their tax information and that their FAFSA information will be saved. It also states that the saved FAFSA will automatically open when they transfer information from the IRS or choose to return to FAFSA on the Web. The user is instructed to click "OK" to continue or "Cancel" otherwise. A "Help" link is provided for assistance. At the bottom of the message box, there are "CANCEL" and "OK" buttons. The footer of the page includes the text "Site Last Updated: Sunday, January 24, 2016" and a link to "Download Adobe Reader".

Figure 1-3

Step 2:

- Click "Ok" to agree to the authorized use page. (Figure 2-1)

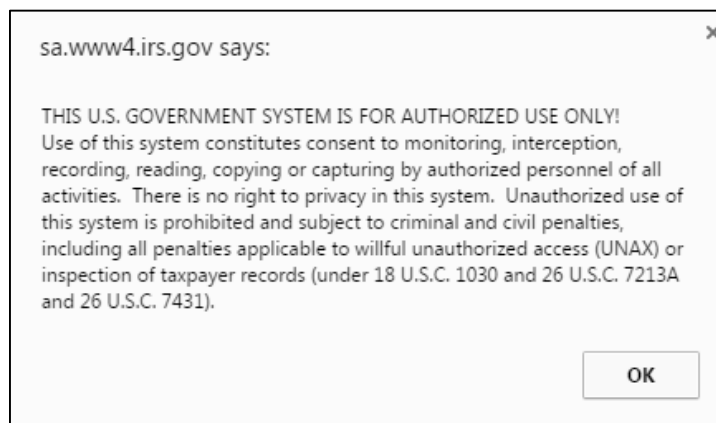


Figure 2-1

- Fill in the required information and click "Submit." (Figure 2-2)

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 20XX Federal Income Tax Return. [?](#)

Required fields *

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	*** - ** - ****
Date of Birth *	<input type="text"/> / <input type="text"/> / <input type="text"/>
Filing Status * ?	<input type="text" value="▼"/>
Address - Must match your 20XX Federal Income Tax Return. ?	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	<input type="text" value="▼"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	<input data-bbox="829 1142 1252 1171" type="text" value="Select One"/>
ZIP Code *	<input type="text"/>

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.

Figure 2-2

- Verify the information you entered, select "Transfer My Tax Information into the FAFSA" and click "Transfer Now". (Figure 2-3)

Student 20xx 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	20xx	
Name(s)	John D & Jane L Doe	
Social Security Number	*** - ** - 5555	
Filing Status	Married-Filed Joint Return	Question 34 on the FAFSA
Type of Tax Return Filed	1040	Question 33 on the FAFSA
Adjusted Gross Income	\$xx,xxx	Question 36 on the FAFSA
Income Earned From Work [?]	\$xx,xxx	Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Student: Question 39 on the FAFSA and/or Spouse: Question 40 on the FAFSA
Income Tax	\$x,xxx	Question 37 on the FAFSA
IRS Exemptions	xx	Question 38 on the FAFSA
Education Credits	\$xx	Question 44a on the FAFSA
IRA Deductions and Payments	\$xx	Question 45b on the FAFSA
Tax-Exempt Interest Income	\$xx	Question 45d on the FAFSA
Untaxed IRA Distributions [?]	\$xx	Question 45e on the FAFSA
Untaxed Pensions [?]	\$xx	Question 45f 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](#) [?]

[IRS Privacy Policy](#)

Figure 2-3

- Continued below....

- You will receive confirmation that your tax information imported into the FAFSA. (Figure 2-4)

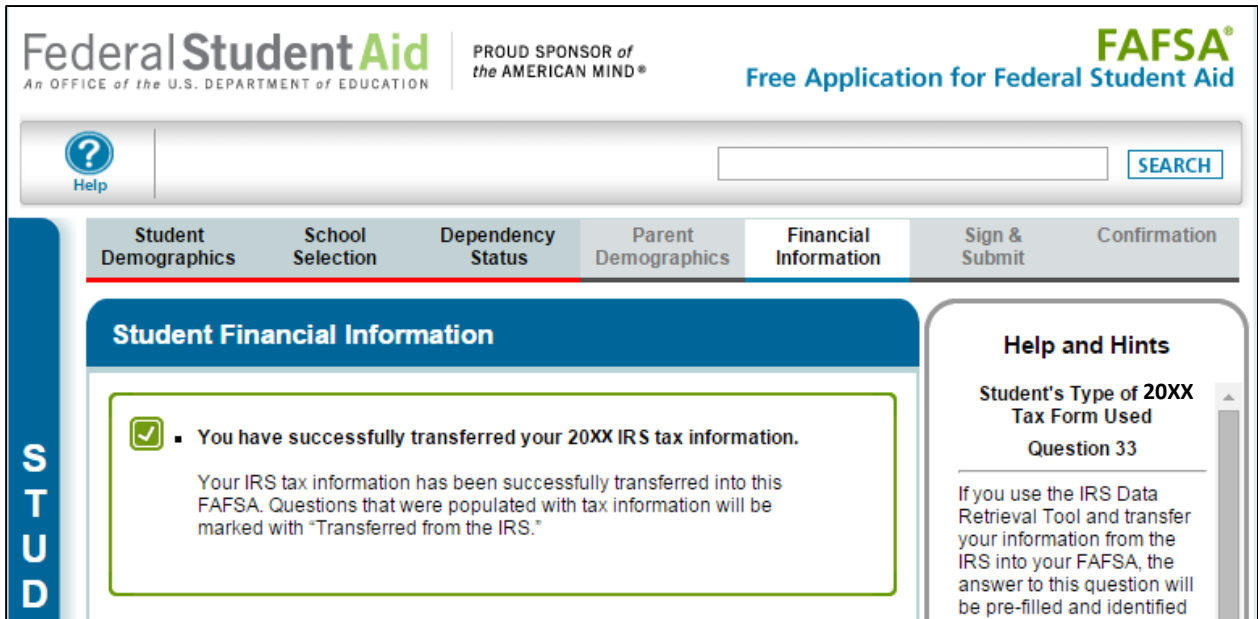


Figure 2-4

Step 3:

- You will be directed back to the FAFSA. It is important that you **do not change the financial information that was imported from the IRS**. On the top menu bar, click "Sign & Submit". (Figure 3-1)

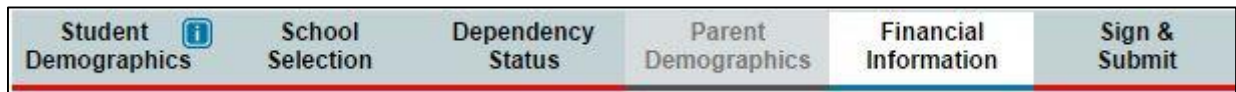


Figure 3-1

- Under the "Sign & Submit" page, you will be notified that you have made changes and that your application was saved (Figure 3-2). Click "Next" at the bottom of the page. (Figure 3-3)

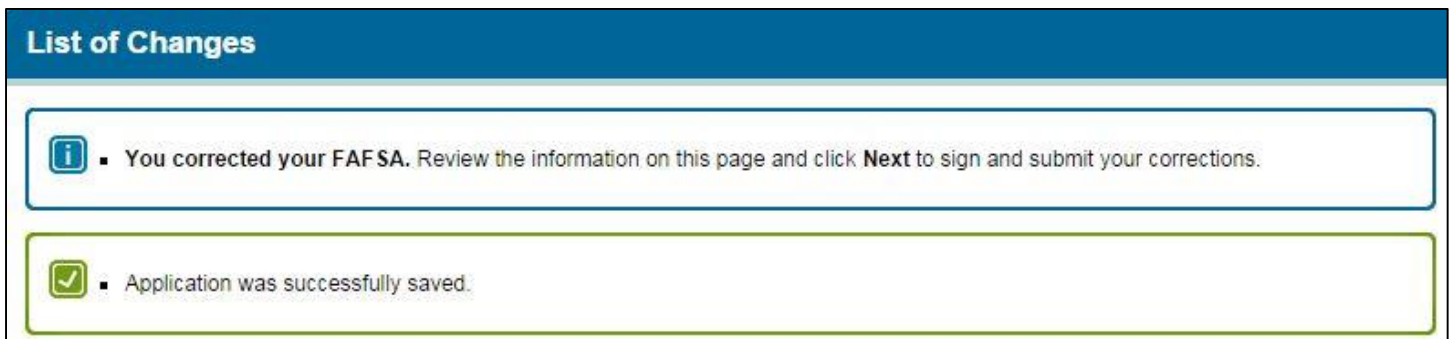


Figure 3-2



Figure 3-3

- In order for TMC to receive your updated FAFSA you will need to "Sign & Submit" your FAFSA. Verify your information, read the terms, agree to the terms, click "sign" if you agree, and then click "Submit My FAFSA Now". (Figure 3-4)

Figure 3-4

You are finished!!!

Notes:

- Your FAFSA will take 3-5 days to arrive at Merrimack.
- Once we receive your FAFSA we may contact you if we determine that additional documentation is needed.
- If you are having trouble logging into the IRS website to transfer your IRS information, you must contact the IRS to resolve your issue. Merrimack's Office of Financial Aid cannot provide technical assistance for this website.
- If you are still having issues you may call the IRS to request a tax return transcript. The Transcript service number is 800-908-9946.