

IRS DATA RETRIEVAL TOOL VERIFICATION

Approximately 2 weeks after electronically filing taxes – log into FAFSA.gov.

1. Go to the **Financial Information** tab.

2. Change the tax question to **Already Completed**.

Answer the questions; the IRS link will be shown if all answers are **NO**.

3. Enter parent **FSA ID**, click on **LINK TO IRS**.

FOLLOW THE PROMPTS to go to the IRS page and transfer the tax return information into the FAFSA.

The transferred information will be displayed.
Do not change IRS tax information that has been transferred.

4. Click **NEXT** after reviewing information.
If student filed taxes, repeat steps.

5. Proceed to the **SIGN and SUBMIT** page – enter FSA ID, agree to privacy terms and **SUBMIT** the new verified FAFSA information.

An updated Student Aid Report (SAR) will be sent via email and the student's school choices will receive the updated FAFSA information.

If updated information changes an award package, a new award package will be sent to the student.



Pennsylvania Higher Education Assistance Agency

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The screenshot shows the FAFSA 'Parent Tax Information' page. At the top, there are navigation tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information (highlighted with a red circle 1), Sign & Submit (highlighted with a red circle 5), and Confirmation. A search bar is located to the right of the tabs. Below the tabs, a green box displays a success message: 'Application was successfully saved.' Two questions are visible: 'For 2015, have your parents completed their IRS income tax return or another tax return?' with a dropdown menu set to 'Already completed' (highlighted with a red circle 2), and 'For 2015, what is your parents' tax filing status according to their tax return?' with a dropdown menu set to 'Married-Filed Joint Return'. A large text block explains the IRS Data Retrieval Tool and asks several questions with radio button options: '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), and 'Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?' (Yes/No). Below these questions, a recommendation states: '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.' This is followed by the instruction 'Enter your FSA ID and click Link To IRS.' and a dropdown menu for 'Which parent are you?'. A red circle 3 highlights the question 'What is your (the parent's) FSA ID?' and the input fields for 'FSA ID Username or Verified E-mail Address' and 'FSA ID Password'. A red circle 4 highlights the 'LINK TO IRS' button. At the bottom, there are buttons for 'PREVIOUS', 'NEXT', 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. On the right side, a 'Help and Hints' section titled 'Recently Filed Taxes?' provides additional information. A black callout box on the right side of the page says 'Visit FAFSA.gov today!'.