

Bacone College Office of Financial Aid
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FAFSA - IRS Data Retrieval and IRS Tax Transcript Instructions

The Office of Federal Student Aid (Department of Education) and the Internal Revenue Service (IRS) have worked together to develop a process, known as the IRS Data Retrieval Process, to simplify the steps to complete the Free Application for Federal Student Aid (FAFSA).

What is the IRS Data Retrieval? This process will allow you to automatically have your family's income information input into your 2014-15 FAFSA. The process enables FAFSA to request and retrieve the 2013 income and 2013 federal tax data directly from the IRS.

All 2014-15 FAFSA applicants, and the parents of dependent applicants, who indicate that they have filed their 2012 federal tax returns prior to completing their 2014-15 FAFSA are highly encouraged to use the FAFSA-IRS Data Retrieval process to complete the 2014-15 FAFSA.

Some Families Will Not Be Able to Use the IRS Data Retrieval Tool:

- ☒ If the parents of a dependent student file separate 2013 tax returns;
- ☒ If an applicant's parent has a change in marital status after the end of the tax year (2013) on December 31;
- ☒ If anyone has filed an amended 2013 federal tax return;
- ☒ If the applicant or applicant's parents have filed a 2013 foreign tax return.

Families Unable to Use the IRS Data Retrieval Tool: If you are unable to use the IRS Data Retrieval Tool you must request an IRS Transcript to verify your income. Please complete **IRS form 4506-T**.

How the IRS Data Retrieval works: If you and your parents have filed 2013 federal tax returns before starting the 2014-15 FAFSA, you will be able to obtain your income information while completing the 2014-15 FAFSA. If you have not filed federal tax returns before starting the 2014-15 FAFSA, you may input the IRS Data Retrieval information after filing 2013 federal tax returns by using the 2014-15 FAFSA corrections process.

Electronically filed 2013 federal tax return information will be available online from the IRS site 1-2 weeks after the 2013 federal tax return has been filed; data from paper 2013 federal tax returns will be available in 6-8 weeks.

Student and parents must actively choose to utilize the data retrieval. When you choose to do so, you will be transferred to the Internal Revenue Service web site. You will need to authenticate your identity before any personal information is displayed.

During the completion of the 2014-15 FAFSA, you will have the option to “Transfer” 2013 federal tax information to the 2014-15 FAFSA. Applicants can also choose NOT to transfer the data to the 2014-15 FAFSA. Transferred data will have a notation - “Transferred from the IRS.”

FAFSA Corrections: Many parents of our new students will not have their 2013 federal tax returns completed when they apply to Bacone College. If you are a new student, you and your parents can use “estimated income” information on the initial 2014-15 FAFSA. You and your parents will be able to use the 2014-15 FAFSA corrections process when your 2013 federal tax returns are completed.

Parent Finance 1 - FAFSA on the Web - Federal Student Aid

START HERE GO FURTHER FEDERAL STUDENT AID

FAFSA® Free Application for Federal Student Aid

Central 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 2013, have your parents completed their IRS income tax return or another tax return?

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

Check all that apply or check **None of the above**.

- You, the parents, filed as Married Filing Separately
- You, the parents, filed as Head of Household
- You, the parents, filed an amended tax return
- You, the parents, filed a Puerto Rican or foreign tax return
- You, the parents, recently filed taxes
- None of the above

If you filed your taxes electronically within the last 2 weeks or if you filed your taxes by mail within the last 8 weeks, your tax information may not be available yet from the IRS. You can determine if you should attempt to access your tax information from the IRS at this time. Keep in mind any [deadlines](#).

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

Which parent are you?

What is your (the father's/stepfather's) PIN?
 [Apply For A PIN](#)
[I Forgot/Don't Know My PIN](#)
LINK TO IRS

Help and Hints

What is your (the parent's) PIN?

A parent **must** enter a Federal Student Aid PIN to access the IRS Web site and request tax information.

- If you (the parent) do not already have a PIN and would like to apply for one, click "Apply For A

<https://fafsa.demo.test.ed.gov/FAFSA/app/fafsa?execution=e2s13> [12/26/2011 10:45:43 PM]