



Completing the FAFSA without the IRS Data Retrieval Tool

The IRS Data Retrieval Tool will not be available for students and families to use until October 1, 2017. **Students should not delay completing the FAFSA.** In lieu of using the IRS Data Retrieval Tool you will manually enter you and/or your family's **2015 tax information.** **You will use your 2015 tax information for BOTH the 2016-2017 & the 2017-2018 FAFSA.**

If you cannot locate a copy of your 2015 tax return, you may obtain your tax return transcript online from the IRS at www.irs.gov/transcript at Get Transcript Online, with the proper identity verification. You may also access [Get Transcript by Mail](#) online, or call 1-800-908-9946, and a transcript will be delivered to the address of record within 10 to 15 days.

Below are specific 2015 federal tax return line items that you may be required to enter on the 2016-2017 and/or 2017-2018 FAFSA. While the FAFSA will also provide clear instructions, this should serve as a guiding reference.

Line Items from the 2015 Tax Return			
Tax Return Items	1040 Line Item	1040A Line Item	1040EZ Line Item
Adjusted Gross Income	37	21	4
Income Taxes Paid	56 minus 46	28 minus 36	10
Exemptions	6d	6d	If you didn't check either box on line 5, enter 01 if you are single or have never been married or 02 if you are married. If you checked either the "you" or "spouse" box on line 5, use 1040EZ worksheet line F to determine the number of exemptions (\$4,000 equals one exemption).
Income from Work	See W-2's or Line Items 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065)	7	1
Education Credits	50	33	N/A
Taxable College grant and scholarships	As reported to the IRS in your adjusted gross income	As reported to the IRS in your adjusted gross income	As reported to the IRS in your adjusted gross income
Combat Pay or Special Combat Pay	Enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay	Enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay	N/A
Payments to tax deferred pension and retirement savings plans	See W-2's (Box 12a through 12d, codes D, E, F, G, H, and S)	See W-2's (Box 12a through 12d, codes D, E, F, G, H, and S)	See W-2's (Box 12a through 12d, codes D, E, F, G, H, and S)
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans	28 + 32	17	N/A
Tax exempt interest income	8b	8b	N/A
Untaxed portions of IRA distributions	(15a-15b) Exclude rollovers, if negative, enter zero	(11a – 11b) Exclude rollovers, if negative, enter zero	N/A
Untaxed portions of pensions	(16a-16b) Exclude rollovers, if negative, enter zero	(12a – 12b) Exclude rollovers, if negative, enter zero	N/A
Untaxed portions of health savings accounts	25	N/A	N/A



Frequently Asked Questions:

Completing the 2017-2018 FAFSA using 2015 Tax Returns

Q: Should I wait until I have filed my federal income tax returns to submit the 2017-2018 FAFSA?

A: No, the 2017-2018 FAFSA is also called the Early FAFSA as it became available October 1, 2016. Applicants will use their 2015 tax return data. Do not enter your 2016 tax information as that will create a discrepancy on your FAFSA record.

Q: I already completed my 2017-2018 FAFSA but I used my 2016 tax information. What should I do?

A: There are 2 ways to update this information.

1. Log onto www.fafsa.gov, select correction and update the tax information using your 2015 tax information. Submit the application for correction.

Or if you were selected for verification and required to provide documents to our office:

2. Obtain a copy of your 2015 federal tax return transcript from the IRS and submit to the financial aid office for review and correction. Click [here](#) for instructions on obtaining a tax return transcript.
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Q: When will the IRS Data Retrieval Tool become available?

A: The IRS Data Retrieval Tool is anticipated to become available for the next FAFSA season, which is the 2018-2019 FAFSA. The 2018-2019 FAFSA will become available October 1, 2017.

Q: How soon should I go online and complete the FAFSA?

A: Students anticipating financial aid funding for Summer 2017 should have a 2016-2017 FAFSA on file with UCF. The federal deadline to complete the 2016-2017 FAFSA is June 30, 2017.

Students anticipating financial aid funding for the 2017-2018 academic year were given a UCF FAFSA Completion Priority Date of December 1, 2016 for maximum consideration of aid. Students however are strongly encouraged to complete the FAFSA as soon as possible and have a completed file no later than 60 days before the start of the term.



Student Financial Assistance

Q: My parent(s) and/or I did not file a federal tax return. Does this impact my ability complete the FAFSA?

A: No, you can still submit the FAFSA. You should determine, however, if you or your parent(s) gross income is less than the filing thresholds listed in the chart below. The IRS determines the minimum amount a person may earn and not file a tax return. If upon further review you and/or your parent(s) are required to file a return, you may need to submit a FAFSA Correction and add the federal tax return data.

Table 1-1. 2015 Filing Requirements for Most Taxpayers

IF your filing status is...	AND at the end of 2015 you were...*	THEN file a return if your gross income was at least...**
single	under 65	\$10,300
	65 or older	\$11,850
married filing jointly***	under 65 (both spouses)	\$20,600
	65 or older (one spouse)	\$21,850
	65 or older (both spouses)	\$23,100
married filing separately	any age	\$ 4,000
head of household	under 65	\$13,250
	65 or older	\$14,800
qualifying widow(er) with dependent child	under 65	\$16,600
	65 or older	\$17,850

* If you were born on January 1, 1951, you are considered to be age 65 at the end of 2015. (If your spouse died in 2015 or if you are preparing a return for someone who died in 2015, see Pub. 501.)

** Gross income means all income you received in the form of money, goods, property, and services that isn't exempt from tax, including any income from sources outside the United States or from the sale of your main home (even if you can exclude part or all of it). Don't include any social security benefits unless (a) you are married filing a separate return and you lived with your spouse at any time during 2015 or (b) one-half of your social security benefits plus your other gross income and any tax-exempt interest is more than \$25,000 (\$32,000 if married filing jointly). If (a) or (b) applies, see the instructions for Form 1040 or 1040A or Pub. 915 to figure the taxable part of social security benefits you must include in gross income. Gross income includes gains, but not losses, reported on Form 8949 or Schedule D. Gross income from a business means, for example, the amount on Schedule C, line 7, or Schedule F, line 9. But, in figuring gross income, don't reduce your income by any losses, including any loss on Schedule C, line 7, or Schedule F, line 9.

*** If you didn't live with your spouse at the end of 2015 (or on the date your spouse died) and your gross income was at least \$4,000, you must file a return regardless of your age.