

# Using the IRS Data Retrieval Tool

The IRS Data Retrieval Tool automatically pulls your tax information from the IRS into your FAFSA. We highly recommend using the tool for a smoother financial aid process.

## ***Why should you use the tool?***

- Guarantees that the most accurate tax information is submitted.
- Reduces the chance of being asked to complete the verification process.
- If you are selected for verification, it's the easiest way to complete any "Tax Transcript" task.

## ***Who can't use the tool?***

- if you are married, but filed as 'single' or 'married-filing separately' for the requested tax year
- if you filed too recently (within 3 weeks of attempting to use the tool)
- if you filed a 1040X amended tax form
- if you filed a Puerto Rican or foreign tax return

## **Step-by-Step Instructions**

These instructions assume that you have already submitted a FAFSA.

1. Log in to [www.fafsa.gov](http://www.fafsa.gov) with your FSA Username and Password.
2. Click 'Make FAFSA Corrections'.

Welcome, new user!

2018-2019

2017-2018

### Current Application Status: Processed Successfully

Congratulations, your FAFSA was successfully processed.

#### Original Application

Submitted: 01/15/201  
Processed: 01/01/201

#### What Happens Next

- Your FAFSA information was made available to the school(s) you listed on your FAFSA.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA

3. Click on the 'Financial Information' tab. Select 'Already Completed' for the tax return filing status and answer the eligibility questions.

**Student Tax Information**

Application was successfully saved.

For 2016, have you completed your IRS income tax return or another tax return?  
Already completed

For 2016, what is your tax filing status according to your tax return?  
Married-Filed Joint Return

**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.**

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

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


FSA ID Username or Verified E-mail Address [Forgot Username](#)

FSA ID Password [Forgot Password](#)

**LINK TO IRS**

4. If you are eligible to use the tool, you will click on the 'Link to IRS' button.

- o If you are not eligible to the use the tool, [go here for instructions on how to order a Tax Return Transcript.](#)
5. You will leave the FAFSA website and enter the IRS Data Retrieval Tool website. Enter the requested information and click 'Submit'. **Remember to enter your address exactly as it appeared when you filed your taxes.**



[Return to FAFSA](#) | [Log Out](#) | [Help](#)  
[Español](#)

### Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

**Enter the following information from your 2016 Federal Income Tax Return.** ? Required fields \*

First Name *	<input type="text" value="Dependent"/>
Last Name *	<input type="text" value="Data"/>
Social Security Number *	*** - ** - [REDACTED]
Date of Birth *	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>
Filing Status * <span style="color: blue; font-size: small;">?</span>	Single <span style="float: right;">▼</span>
<b>Address - Must match your 2016 Federal Income Tax Return.</b> <span style="color: blue; font-size: small;">?</span>	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) <span style="color: blue; font-size: small;">?</span>	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <span style="float: right;">▼</span>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One <span style="float: right;">▼</span>
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.

6. Review the information that the IRS has retrieved from your tax returns. Check the 'Transfer My Tax Information into the FAFSA' box and click 'Transfer Now'. You will be returned to the FAFSA website.

## Student 2016 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	2016	
Name(s)	Dependent Data	
Social Security Number	*** - ** [REDACTED]	
Filing Status	Single	Question 34 on the FAFSA
Type of Tax Return Filed	1040EZ	Question 33 on the FAFSA
Adjusted Gross Income	\$9,750	Question 36 on the FAFSA
Income Earned From Work	\$20,125	Question 39 on the FAFSA
Income Tax	\$7,025	Question 37 on the FAFSA
IRS Exemptions	5	Question 38 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

***Now that the data is transferred, it will read, 'Transferred from the IRS'. You will not be able to change the information.***

7. If you are using the tool for both the student and the parent, you will have to complete this process twice. Once under the 'Student Financial Information' section and once under the 'Parent Financial Information' section before resubmitting the FAFSA.

8. Continue to the 'Sign & Submit' tab. Follow all of the instructions carefully to submit your FAFSA.

## Sign With an FSA ID

Parent Signature - Sign With an FSA ID

Mother's/Stepmother's Social Security Number

XXX-XX-XXXX

Mother's/Stepmother's last name

XXXXXXXXXX

Mother's/Stepmother's date of birth

MM/DD/YYYY

### READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked:

1. to provide information that will verify the accuracy of your completed form
2. to provide U.S. or state income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

I, the parent, agree to the terms outlined above.

Agree  Disagree

What is your (the Mother's/Stepmother's) FSA ID?

FSA ID Username or Verified E-mail Address

XXXXXXXXXX

[Create an FSA ID](#)

FSA ID Password

XXXXXXXXXX

[Forgot Username](#)

[Forgot Password](#)

Student Signature - Sign With an FSA ID

### READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same

I, the student, agree to the terms outlined above.

Agree  Disagree

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

FSA ID Username or Verified E-mail Address

XXXXXXXXXX

[Create an FSA ID](#)

FSA ID Password

XXXXXXXXXX