

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 Puerto Rican or foreign tax return

PROCEED TO THE
NEXT PAGE FOR
STEP-BY-STEP
INSTRUCTIONS

Step-by-Step Instructions

These instructions assume that you have already submitted a FAFSA.

1. Log in to www.fafsa.gov with your FSA Username and Password.
2. Click 'Make FAFSA Corrections'.

My FAFSA - 2018-2019

Welcome, Harvey Demolastname!

2018-20192017-2018

Current Application Status: Processed Successfully

Congratulations, your FAFSA was successfully processed.

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
- [View Correction History](#) to view corrections made to your FAFSA
- [Create a shareable file with some of your student information using MyStudentData Download.](#)

Transaction History

Original Application	Latest Correction
<ul style="list-style-type: none">• Submitted: 10/01/2017• Processed: 10/01/2017	<ul style="list-style-type: none">• Submitted: 10/01/2017• Submitted By: System• Processed: 10/01/2017

FSA ID Last Time, Date FSA ID Used: 10/3, 09/18/2018

FSA ID Status:
[User Account Management](#)
You can use your FSA ID to sign your FAFSA electronically or make corrections to your FAFSA.

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

The screenshot shows the 'Student Tax Filing Status' application form, specifically the 'Financial Information' tab. The progress bar at the top indicates that 'Student Demographics', 'School Selection', and 'Dependency Status' are completed (marked with green checkmarks), while 'Financial Information' is currently being filled out (marked with a pencil icon). The 'Sign & Submit' and 'Confirmation' tabs are also visible.

STUDENT INFORMATION

Application was successfully saved.

i Because the FAFSA belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

i Attention! You must provide financial information from your **2016 tax return** on the following pages.

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

Did you file a Puerto Rican or foreign tax return for 2016? ?
 Yes No

IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

[LINK TO IRS](#)

PREVIOUS NEXT

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 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.**

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 *	Dependent
Last Name *	Data
Social Security Number *	*** - ** - [REDACTED]
Date of Birth *	[] / [] / []
Filing Status * ?	Single
Address - Must match your 2016 Federal Income Tax Return. ?	
Street Address *	[REDACTED]
P.O. Box (Required if entered on your tax return) ?	[REDACTED]
Apt. Number (Required if entered on your tax return)	[REDACTED]
Country *	United States
City, Town or Post Office *	[REDACTED]
State/U.S. Territory *	Select One
ZIP Code *	[REDACTED]

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.



[Return to FAFSA](#)

[Submit](#)

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. 

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. 

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.

Signature Options

Student Demographics School Selection Dependency Status Parent Demographics Financial Information **Sign & Submit** Confirmation

Reminder! Your FSA ID can be used to electronically sign federal student aid documents or access your personal information. So it is important to remember that even if you are receiving help completing the FAFSA, you should not share your FSA ID with anyone assisting you. Choose a different signature option if you are unable to sign with your FSA ID confidentially.

Student Signature for
Social Security Number: XXX-XX-3002
Last Name: Lastnametransfer
Date of Birth: 11/02/1996

SIGN THIS FAFSA

SIGNATURE STATUS NEXT

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Signature Status

Student Demographics School Selection Dependency Status Parent Demographics Financial Information **Sign & Submit** Confirmation

You have provided all necessary signatures. Click **Submit My FAFSA Now** to submit your FAFSA.

Student Signed With FSA ID

Social Security Number: XXX-XX- [REDACTED]
Last Name: Lastnametransfer
Date of Birth: [REDACTED]
Signature Status: Signed Electronically

PREVIOUS **SUBMIT MY FAFSA NOW**

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