

FAFSA IRS Data Retrieval

Step 1:

- Sign into the FAFSA and on the homepage select that you wish to "Make A Correction to an Existing FAFSA." Select the appropriate year.
- On the Financial Information page, answer the IRS Data Retrieval Tool questions appropriately. If the IRS determines you are eligible, you can perform the Data Retrieval. Click on the "Link to IRS" button. (Figure 1-1)

Student Tax Filing Status

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

STUDENT INFORMATION

Application was successfully saved.

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

Attention! You must provide financial information from your **2017 tax return** on the following pages.

For 2017, have you completed your IRS income tax return or another tax return? ?
Already completed

For 2017, 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 2017? ?
 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

Figure 1-1

- You will be taken to a page that will inform you that you will be leaving the FAFSA. Click “Proceed to IRS Site”. (Figure 1-2)

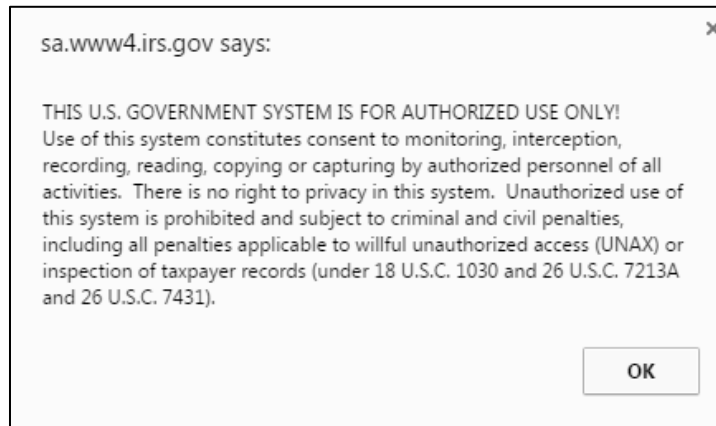
Figure 1-2

- You will receive another warning that you are leaving the page. (Figure 1-3)

Figure 1-3

Step 2:

- Click "Ok" to agree to the authorized use page. (Figure 2-1)



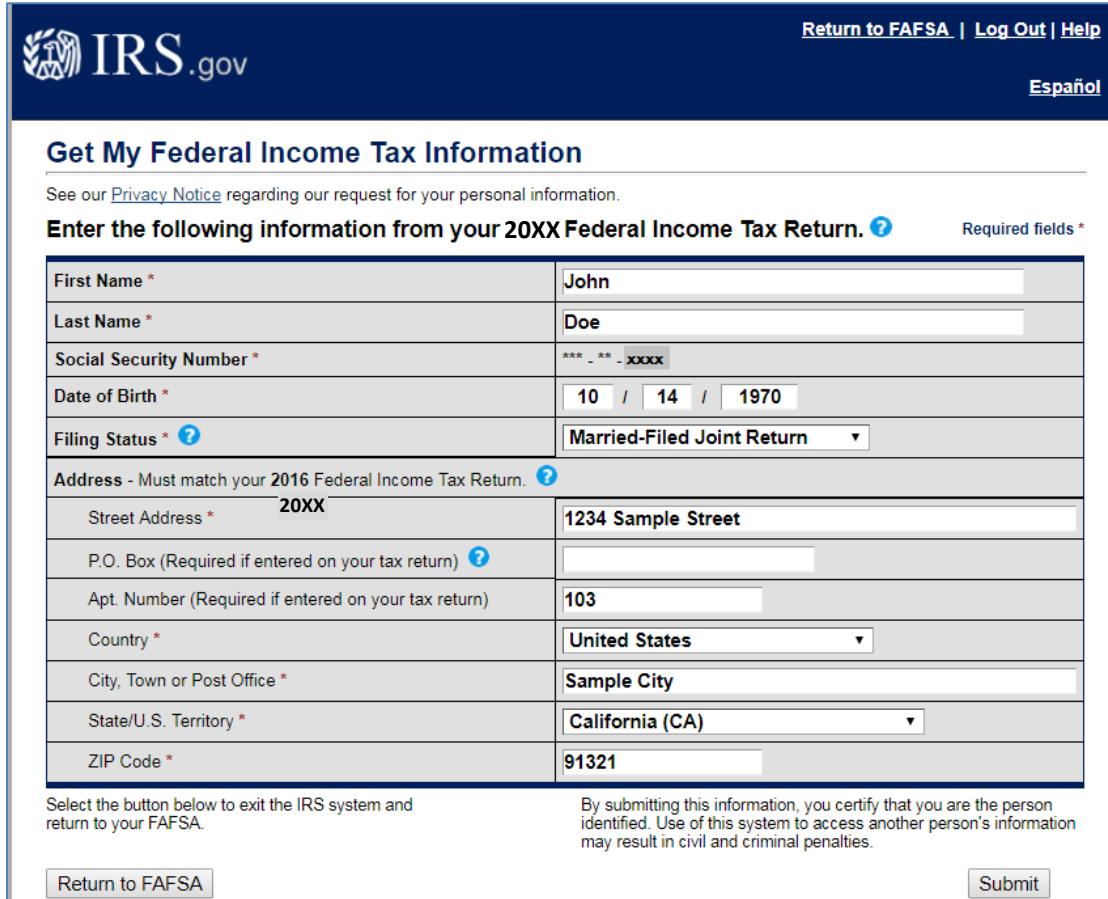
sa.www4.irs.gov says:

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!
Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

OK

Figure 2-1

- Fill in the required information and click "Submit." (Figure 2-2)



IRS.gov [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 20XX Federal Income Tax Return. [?](#) Required fields *

First Name *	John
Last Name *	Doe
Social Security Number *	*** - ** - xxxx
Date of Birth *	10 / 14 / 1970
Filing Status * ?	Married-Filed Joint Return ▼
Address - Must match your 2016 Federal Income Tax Return. ?	
Street Address * 20XX	1234 Sample Street
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	103
Country *	United States ▼
City, Town or Post Office *	Sample City
State/U.S. Territory *	California (CA) ▼
ZIP Code *	91321


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](#)

Figure 2-2

- Verify the information you entered, select "Transfer My Tax Information into the FAFSA" and click "Transfer Now". (Figure 2-3)



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

20XX Federal Income Tax Information

John A & Jane A Doe


Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

Tax Year	Type of Return Filed	Untaxed Pensions
Name(s)	Adjusted Gross Income	Untaxed IRA Distributions
Social Security Number	Income Earned from Work	Tax-exempt Interest Income
Filing Status	Income Tax	IRA Deductions and Payments
IRS Exemptions	Education Credits	Status of Amended Returns Received

Refer to your tax records if you have a question about the values you reported.

 Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA Form ?

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.

?

Do Not Transfer My Tax Information and Return to the FAFSA Form ?

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 form.

?

Figure 2-3

- Continued below....

- You will receive confirmation that your tax information imported into the FAFSA. Simply click “next” to continue (Figure 2-4)

The screenshot displays the 'Student IRS Info' section of the FAFSA application. At the top, a progress bar shows the following steps: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics, Financial Information (pencil icon), Sign & Submit, and Confirmation. A blue banner labeled 'STUDENT INFORMATION' is positioned above a green-bordered box containing a confirmation message. Below the message, two questions are listed, both with 'Transferred from the IRS' as the answer. At the bottom right, there are 'PREVIOUS' and 'NEXT' buttons. The footer includes the text 'Site Last Updated: Sunday, September 30, 2018', a link to 'Download Adobe Reader', and the copyright notice '©2010 fafsa.gov. All rights reserved.'

Student IRS Info

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

STUDENT INFORMATION

✓ **You have successfully transferred your 20XX IRS tax information.**

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with “Transferred from the IRS.” For your protection, IRS tax return information is not displayed on the FAFSA.

What income tax return did you file for 2017? ?
Transferred from the IRS

What was your (and your spouse's) adjusted gross income for 2017? ?
Transferred from the IRS

PREVIOUS NEXT

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Figure 2-4

- You are finished! Continue with the FAFSA until you have signed and submitted it.