

# IRS DATA RETRIEVAL TOOL

A Step by Step Tutorial

**Step 1:** Log into your FAFSA Account by selecting the choice on the left.

**Federal Student Aid**  
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of  
the AMERICAN MIND®

**FAFSA®**  
Free Application for Federal Student Aid

Home Help

SEARCH

### Login

**Student Information**

Form Approved  
OMB No. 1845-0001  
App. Exp. 12/31/2016

Instructions are provided for each FAFSA question in the Help and Hints section on the right side of the page and are also available by clicking **Need Help?** at the bottom of the page.

Enter either your (the student's) FSA ID or personal information to log in to *FAFSA on the Web*.

**Enter your (the student's) FSA ID**

Do not log in with the FSA ID if you are not the student.

OR

**Enter the student's information**

**NEXT**

**NEED HELP?**

### Help and Hints

#### Login Options

The FSA ID, which consists of a user-created username and password, replaced the PIN effective May, 2015. It allows users to electronically access personal information on Federal Student Aid Web sites as well as electronically sign a FAFSA.

Select one:

Enter your FSA ID (only the student should log in with an FSA ID),

Or

Enter the student's name, Social Security Number and date of birth. (You may have to enter your FSA ID later in

STUDENT

Site Last Updated: Sunday, May 10, 2015

Download [Adobe Reader](#)

If you have not created your FSA ID yet you should do this now. Otherwise enter your FSA ID and click 'next'.

## Login

### Student Information

Form Approved  
OMB No. 1845-0001  
App. Exp. 12/31/2016

Instructions are provided for each FAFSA question in the Help and Hints section on the right side of the page and are also available by clicking **Need Help?** at the bottom of the page.

Enter either your (the student's) FSA ID or personal information to log in to *FAFSA on the Web*.

Enter your (the student's) FSA ID

Enter the student's information

Do not log in with the FSA ID if you are not the student.

OR

[Create an FSA ID](#)

FSA ID Username or Verified  
E-mail Address

[Forgot Username](#)

FSA ID Password

[Forgot Password](#)

NEXT

NEED HELP?

## Help and Hints

### Login Options

The FSA ID, which consists of a user-created username and password, replaced the PIN effective May, 2015. It allows users to electronically access personal information on Federal Student Aid Web sites as well as electronically sign a FAFSA.

Select one:

Enter your FSA ID (only the student should log in with an FSA ID),

Or

Enter the student's name, Social Security Number and date of birth. (You may have to enter your FSA ID later in

Accept to continue



Home



Help

SEARCH

### Disclaimer

This is a U.S. Federal Government computer system intended to be solely accessed by individual users expressly authorized to access the system by the U.S. Department of Education. For security purposes and to ensure that the system remains available to all expressly authorized users, the U.S. Department of Education monitors the system to identify unauthorized users. Anyone using this system expressly consents to such monitoring. Except as expressly authorized by the U.S. Department of Education, unauthorized attempts to access, obtain, upload, modify, change, and/or delete information on this system are strictly prohibited and are subject to criminal prosecution under 18 U.S.C § 1030, and other applicable statutes, which may result in fines and imprisonment. For purposes of this system, unauthorized access includes, but is not limited to:

- Any access by an employee or agent of a commercial entity, or other third party, who is not the individual user, for purposes of commercial advantage or private financial gain (regardless of whether the commercial entity or third party is providing a service to an authorized user of the system); and
- Any access in furtherance of any criminal or tortious act in violation of the Constitution or laws of the United States or any State.

If system monitoring reveals information indicating possible criminal activity, such evidence may be provided to law enforcement personnel.

DECLINE

ACCEPT

## Step 2. Select 'Make FAFSA Corrections'

### My FAFSA

Welcome, leann fischer!

2018-2019

2017-2018

#### 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).

Your application has been corrected by a Financial Aid Administrator. To avoid delays in your financial aid process, you should contact your college's financial aid office before making any additional corrections.

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

#### Original Application

Submitted: 10/03/2017  
Processed: 10/04/2017

#### Latest Correction

Submitted: 10/04/2017  
Submitted By: College  
Processed: 10/04/2017

#### FSA ID

Last Time, Date FSA ID Used: 3:33, 11/16/2017

#### FSA ID Status:

[User Account Management](#)

You can use your FSA ID to sign your FAFSA electronically or make corrections to your FAFSA.



Create a shareable file with some of your student information.

[Learn More](#)

### Step 3. Create a Save Key. Click next.

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Home Help

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### Make Corrections to Your 2018-2019 FAFSA

Form Approved  
OMB No. 1845-0001  
App. Exp. 12/31/2019

**Create a Save Key.**  
The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

Create a Save Key  
●●●●

Re-enter Save Key  
●●●●

**NEXT**

**NEED HELP?** **MY FAFSA**

### Help and Hints

Re-enter Save Key


You must re-enter your save key to verify that it is correct.

STUDENT

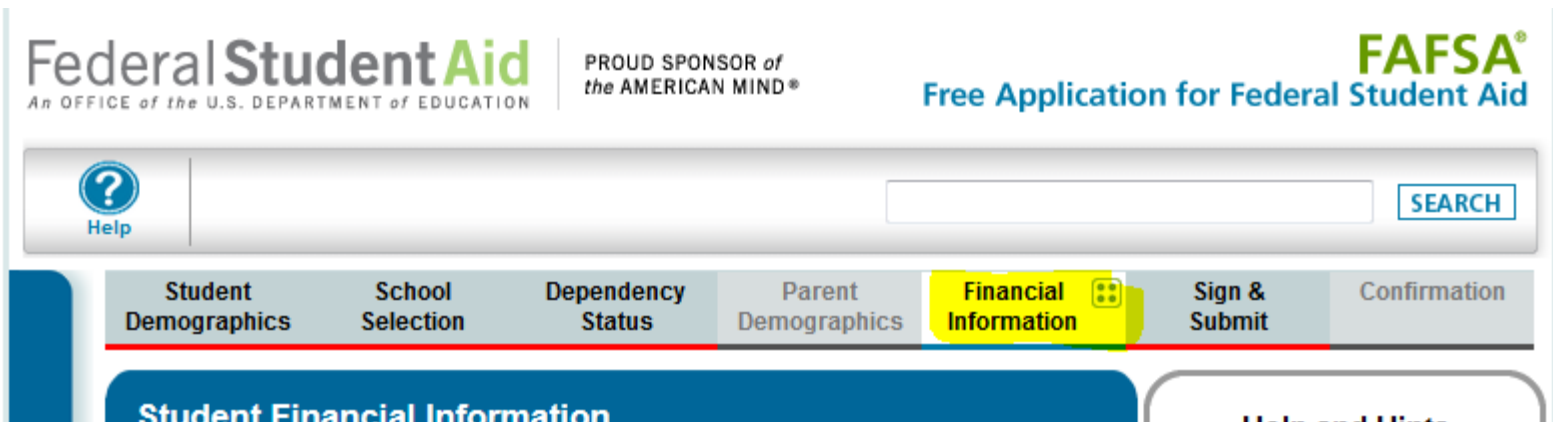
Site Last Updated: Sunday, October 1, 2017

Download [Adobe Reader](#)

Privacy

**Step 4:** Click the “Financial Information” toward the top of the page. If it won’t let you, then you will have to click  on the bottom of each page until you get there.

(If you are providing Parent(s) information, you will do the parent information first)



The screenshot shows the top navigation bar of the FAFSA website. On the left, it features the "Federal Student Aid" logo with the text "An OFFICE of the U.S. DEPARTMENT of EDUCATION" below it. To the right of the logo is the text "PROUD SPONSOR of the AMERICAN MIND®". Further right is the "FAFSA®" logo and the text "Free Application for Federal Student Aid". Below the logo area is a search bar with a "SEARCH" button. On the far left of the navigation bar is a "Help" button with a question mark icon. The main navigation bar consists of several tabs: "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information" (highlighted in yellow), "Sign & Submit", and "Confirmation". Below the navigation bar, the "Student Financial Information" section is partially visible.

**Step 5:** Answer the questions until you see [LINK TO IRS](#) then click on it.

**P**  
**A**  
**R**  
**E**  
**N**  
**T**

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

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

**✓** ▪ Application was successfully saved.

For 2016, has your mother completed her IRS income tax return or another tax return?

For 2016, what is your mother's tax filing status according to her tax return?

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

**⚙** 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](#)

### Help and Hints

#### Filed a Puerto Rican or Foreign Tax Return?

If you, the parent(s), filed a Puerto Rican or foreign tax return, select **Yes**; otherwise, select **No**.

You are not eligible to use the [IRS Data Retrieval Tool](#) if you filed a Puerto Rican or foreign tax return.

Related Topics:  
[Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.?](#)



**Step 6.** If your parents have not created their FSA ID yet, they will need to do this now. Click on Create an FSA ID.

Otherwise enter their FSA ID and password then click on the PROCEED TO IRS SITE button.

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
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**P**  
**A**  
**R**  
**E**  
**N**  
**T**

### Leaving FAFSA on the Web

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.

**For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.**

What is your (the parent's) FSA ID?  
FSA ID Username or Verified E-mail Address

FSA ID Password

[Create an FSA ID](#)  
[Forgot Username](#)  
[Forgot Password](#)

Click **Proceed to IRS Site** to continue. Otherwise, click **Skip IRS Transfer**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

### Help and Hints

**What is your (the parent's) FSA ID Username or Verified E-mail Address?**

Enter your (the parent's) FSA ID username. If you have verified the e-mail address on file with your FSA ID, you may use it instead of your username to access the IRS Web site and request tax information.

If you (the parent) do not already have an FSA ID, you can [create an FSA ID](#). You **must** have a Social Security number to get an FSA ID.

If you (the parent) have an FSA ID but do not remember your username or verified e-mail address, click [Forgot Username](#).


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

**Step 7:** Complete the IRS form. Please note that the information must match what you put on your 2016 IRS Tax Return

**Step 8:** Click Submit

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

### Get My Federal Income Tax Information

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

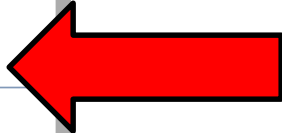
**Enter the following information from your 2016 Federal Income Tax Return.** [?](#) Required fields \*

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	<input type="text"/>
Date of Birth *	<input type="text"/>
Filing Status * <a href="#">?</a>	Head of Household <input type="button" value="v"/>
Address - Must match your 2016 Federal Income Tax Return. <a href="#">?</a>	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) <a href="#">?</a>	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <input type="button" value="v"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One <input type="button" value="v"/>
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.


[IRS Privacy Policy](#)



**Step 9:** The web site should pull up this disclosure:

Check the first box under “Transfer my Tax Information into the FAFSA”

**Step 10:** Click the “Transfer Now” button

 **IRS.gov** [Return to FAFSA](#) | [Log Out](#) | [Help](#)

[Español](#)

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## 2016 Federal Income Tax Information

Leann M Fischer


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.

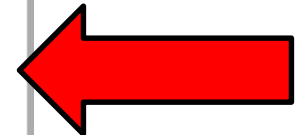
**Transfer My Tax Information into the FAFSA Form** 

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.

[IRS Privacy Policy](#)



**Step 11:** You will automatically be returned to your FAFSA. You will see the words 'Transferred from the IRS' on all of the questions that could be transferred. You will have to answer any questions that do not say "Transferred from the IRS"

**STUDENT**

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

### Student Financial Information

Application was successfully saved.

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

For 2016, what is your tax filing status according to your tax return?

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

You have already transferred your tax information from the IRS.  
[View option to link to the IRS](#)

What income tax return did you file for 2016? **Transferred from the IRS**

What was your adjusted gross income for 2016? **Transferred from the IRS**

How much did you earn from working (wages, salaries, tips, etc.) in 2016? **Transferred from the IRS**

Were you a dislocated worker on the day you submitted your FAFSA?

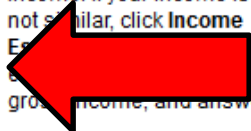
### Help and Hints

Student Filed 2016 Income Tax Return?  
Question 32

You must select the answer that describes your tax filing status:

- Already completed
- Will file
- Not going to file

If you indicate you "Will file" a 2016 tax return and your 2016 income is similar to your 2015 income, use your 2015 income tax return to provide estimates for questions about your income. If your income is not similar, click **Income Ex**  
gross income, and answer



**REPEAT STEPS 5-10**  
**For Student Information**  
**(if providing Parent(s)**  
**information)**

**Step 12:** Click the “Sign & Submit” tab toward the top of the page

**Step 13:** You will see all the corrections made by doing the IRS Data Retrieval Tool. Scroll to the bottom of the page and click the “Next” button

Contact Us
Browse Help
SEARCH

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

List of Changes

i You corrected your FAFSA. Review the information on this page and click Next to sign and submit your corrections.

✓ Application was successfully saved.

This is a list of the FAFSA questions for which you corrected or confirmed your answers.  
Student ID: XXX-XX-0010 MO 01

[PRINT THIS PAGE](#)

Student Demographics - No Change

School Selection - No Change [ADD A SCHOOL](#)

Dependency Status - No Change

Parent Demographics - No Change

Financial Information

	Previous Response	Current Response	
33. What income tax return did you file for 2011?	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
35. What was your (and your spouse's) adjusted gross income for 2011?	[REDACTED]	Transferred from the IRS \$[REDACTED]	<a href="#">Edit</a>
97. Free or Reduced Price Lunch	[REDACTED]		
99. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	[REDACTED]		
36. Enter the amount of your (and your spouse's) income tax for 2011.	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
37. Enter your (and your spouse's) exemptions for 2011.	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
43a. Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040-line 49	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
44b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-total of lines 28+32	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
44d. Tax exempt interest income from IRS Form 1040-line 8b	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
44e. Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b). Exclude rollovers. If negative, enter a zero here	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>
44f. Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b). Exclude rollovers. If negative, enter a zero here	[REDACTED]	Transferred from the IRS [REDACTED]	<a href="#">Edit</a>

[PREVIOUS](#)
[NEXT](#)

NEED HELP?
SAVE
CLEAR ALL DATA
EXIT

**Step 14:** Sign with your and/or your parent's FSA ID by typing in the FSA ID Username and Password. Also choose that you "Agree" to the statement.

**Step 15:** Click "SUBMIT MY FAFSA NOW"

**You are finished!!!**

The screenshot shows the 'Sign & Submit' section of the FAFSA application. At the top, a navigation bar includes tabs for Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit (active), and Confirmation. The 'Sign & Submit' section features a blue header and a green-bordered box with a checkmark icon and the text 'Application was successfully saved.' Below this is a blue button labeled 'VIEW OR PRINT YOUR FAFSA INFORMATION'. A question asks 'Are you a preparer?' with radio buttons for 'Yes' and 'No'. The 'Student Signature' section includes fields for the student's Social Security Number, last name, and date of birth. A 'READ BEFORE PROCEEDING' box contains a statement and four numbered terms of agreement. Below this, there are radio buttons for 'Agree' and 'Disagree'. The 'FSA ID' section has fields for 'FSA ID Username or Verified E-mail Address' and 'FSA ID Password', with a 'SIGN' button. A callout box provides a link to 'Create an FSA ID'. At the bottom, there are 'PREVIOUS' and 'SUBMIT MY FAFSA NOW' buttons. A 'Help and Hints' sidebar on the right explains the role of a preparer. Three large red arrows point to the 'VIEW OR PRINT YOUR FAFSA INFORMATION' button, the 'Agree' radio button, and the 'SUBMIT MY FAFSA NOW' button.

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

Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a preparer?  
 Yes  No

#### Student Signature

Student's Social Security Number: [REDACTED]  
Student's last name: [REDACTED]  
Student's date of birth: [REDACTED]

**READ BEFORE PROCEEDING**

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

- will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
- are not in default on a federal student loan or have made satisfactory arrangements to repay it,
- do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
- will notify your school if you default on a federal student loan, and

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

What is your (the student's) FSA ID?  
Do not enter the FSA ID if you are not the student.  
FSA ID Username or Verified E-mail Address: [REDACTED]  
FSA ID Password: [REDACTED]

[Don't have an FSA ID? Create an FSA ID. It takes only a few minutes.](#)

[Other options to sign and submit](#)

#### Help and Hints

##### Are you a preparer?

A preparer is anyone who charges a fee for helping you fill out your FAFSA.

Typically high school counselors, school financial aid administrators, or other mentors do not charge a fee to help you complete your application, so they are not considered preparers unless you paid them for their services.

If you are a preparer, select **Yes**.



If for some reason you get this while trying to find your tax information, click the return to fafsa button. Then go to the IRS website and request a return transcript be mailed to you.



[Help](#)

[Español](#)

**We are unable to provide you with your Federal Income Tax Information.**

## What went wrong?

- **You may have recently filed a Federal Income Tax Return for 2013.**  
If you recently filed your taxes your IRS information may not be available yet. If you filed your taxes electronically, it may take 2-3 weeks; but if you filed your taxes via the mail it may take 8-11 weeks.  
  
You can use your personal copies of your tax returns and complete the FAFSA. You could also wait until your IRS information becomes available before submitting your FAFSA, but you should keep in mind any deadlines.
- **You may not have filed a Federal Income Tax Return for 2013.**  
Return to the FAFSA to review your previous answers.

Close Window

Return to FAFSA