

IRS DATA RETRIEVAL TOOL

A Step by Step Tutorial

Step 1: Log into your FAFSA Account with your FSA ID you do not already have one)

password (create an account if



You will be returned to your FAFSA® form.

After logging in, you may have to confirm some information before being redirected back to your FAFSA form.

Log In ↗

FSA ID Username, Email, or Mobile Phone

[Forgot My Username](#)

Password

[Forgot My Password](#)

Log In

OR

[Create an Account](#)

Accept to continue

Please Read Before Continuing

You are accessing 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. Usage may be monitored, recorded, and/or subject to audit. For security purposes and in order 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 and recording. Unauthorized use of this information system is prohibited and subject to criminal and civil penalties. 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.

Accept

Decline

Step 2. Select 'Make Correction' if you are making a correction or click "Start FAFSA form" if you are starting fresh

2022-23 2021-22

Current Application Status:

 Processed—Action Required

Your application has been processed but requires some follow up.

Select "Make Correction" to see what action is required and make the necessary corrections.

Original Application: Submitted on 10/08/2020; Processed on 10/26/2020

Latest Correction: Submitted on 10/08/2020; Submitted by College; Processed on 04/26/2021

[Make Correction](#)

2022-23 2021-22

Current Application Status:

 Not Started

We did not find a 2022-23 FAFSA form on file for you.

To receive student financial aid, you need to fill out a FAFSA form every school year. Are you attending college between July 1, 2022 and June 30, 2023? If so, fill out the 2022-23 FAFSA form.

[Start a 2022-23 FAFSA Form](#)

Step 3. Create a Save Key. Click next.

2022–23 FAFSA[®] Form

[? Help](#)

Start Student's 2022–23 FAFSA[®] Form

Create a save key.

The save key is for temporary use for you or your parent to return and complete this specific FAFSA form.

Create a Save Key

Show [?](#)

Reenter Save Key

Show [?](#)

[Previous](#)

[Continue](#)

Step 4: Click the “Student Financials” tab toward the top of the page. If it won’t let you, then you will have to click “ Exit Section” on the bottom of each page until you get there.

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

2022–23
FAFSA[®] Form

FAFSA Home | Help | Save FAFSA Form | Review FAFSA Form | Reset FAFSA Form | Exit FAFSA Form

1 Student Demographics | 2 School Selection | 3 Dependency Status | 4 Parent Demographics | 5 Parent Financials | 6 Student Financials | 7 Sign & Submit

Review any info you'd like to, then click continue to proceed to the application.

[+ Expand All](#)

| | |
|---|---|
| How can I get help completing my FAFSA® form? | ⌵ |
| How many steps does it take to complete my FAFSA® form? | ⌵ |
| How long will it take to complete my FAFSA® form? | ⌵ |
| Can I save my FAFSA® form if I can't finish it? | ⌵ |
| What documents do I need to complete the FAFSA® form? | ⌵ |
| How do I sign the FAFSA® form? | ⌵ |
| What is FAFSA web's security and privacy? | ⌵ |

Continue

Step 5: Answer the questions until you see " Proceed to the IRS"

For 2020, have you completed your IRS income tax return or another tax return?

Already completed



What income tax return did you file for 2020?

IRS Form 1040



For 2020, what is your tax filing status according to your tax return?

Single



RECOMMENDED

IRS Data Retrieval Tool

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

For your protection, your tax return information will not display on the IRS website or on the FAFSA® form.

Previous

Skip IRS DRT and Complete Manually

Proceed to the IRS >

Step 6. Select " Proceed to the IRS" then select "OK"

STUDENT INFORMATION

Student Leaving Your FAFSA® Form

You have entered answers to one or more income questions. Your FAFSA form will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA form.

You are now leaving your FAFSA form and will be transferred to the IRS website to access your IRS tax information. Your FAFSA information will be saved.

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

STUDENT INFORMATION Close X

You are now leaving this page. Select "OK" to continue or select "Cancel" to stay on this page. Your FAFSA information will be saved if you choose to continue.

Your saved FAFSA form will automatically open either when you transfer your information from

When you arrive at the IRS site, you will have to select "OK" once more



[Return to FAFSA](#) | [Help](#) | [Logout](#) | [Español](#)

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!

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 IRS Tax Return for the year requested

Step 8: Click Submit

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Get My Federal Income Tax Information

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

Enter the following information from your 2020 Federal Income Tax Return. [?](#)

All fields are required unless marked otherwise.

First Name

Last Name

Social Security Number
No input required

Date of Birth
MM/DD/YYYY
 

Filing Status [?](#)

Street Address [?](#)
Must match your 2020 Federal Income Tax Return

P.O. Box [?](#)
Required if entered on your tax return

P.O. Box [?](#)
Required if entered on your tax return

Apartment Number
Required if entered on your tax return

Country
United States

City, Town or Post Office

State / U.S. Territory
Minnesota (MN)

ZIP Code

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.

SUBMIT

Select the button below to exit the IRS system and return to your FAFSA.

CANCEL

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

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

Step 10: Click the “Transfer Now” button

IRS Return to FAFSA | Help | Logout | Español

2020 Federal Income Tax Information

Elley R Knight

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 Portion of IRA Distributions & Pensions/Annuities |
| Name(s) | Adjusted Gross Income | Tax-exempt Interest Income |
| Social Security Number | Income Earned from Work | IRA Deductions and Payments |
| Filing Status | Income Tax | Status of Amended Returns Received |
| IRS Exemptions | Education Credits | Schedule 1 Evaluation |

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

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.

TRANSFER NOW ?

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.

DO NOT TRANSFER ?

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"

2022-23 FAFSA[®] Form

[FAFSA Home](#)[Help](#)[Save FAFSA Form](#)[Review FAFSA Form](#)[Reset FAFSA Form](#)[Exit FAFSA Form](#)

Student Demographics



School Selection



Dependency Status



Parent Demographics



Parent Financials



Student Financials



Sign & Submit

STUDENT INFORMATION

Student IRS Info



You have successfully transferred your 2020 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA[®] form. 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 form.

What was your adjusted gross income for 2020?

Transferred from the IRS



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Continue

Step 12: Click the “Sign & Submit” tab toward the top of the page (or “continue” on the bottom of the page if you have more questions to complete)

Step 13: You will be able to review a summary of your FAFSA responses. Scroll to the bottom of the page and click the “Continue” button

| SECTION 7 Sign and Submit  | |
|---|--|
| Preparer's Social Security Number (question 104) | |
| Preparer's Employer Identification Number (question 105) | |

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Step 14: Read through the information prior to signing.

Step 15: Click the check-box next to the agreement statement then select "Sign and Submit FAFSA Form"

You should then be brought to a page that says "Congratulations" and confirms that your FAFSA was successfully submitted to Federal Student Aid.



The screenshot shows a digital form with a horizontal line. On the left side of the line, there is a yellow highlight around a white checkmark icon inside a small square. To the right of the checkmark, the text "I, [redacted], agree to the terms outlined above." is displayed. Below the horizontal line, there are two buttons. The button on the left is white with a blue border and the text "Previous". The button on the right is blue with white text that reads "Sign and Submit FAFSA Form" followed by a document icon. This right button is highlighted with a large yellow oval.