

IRS Data Retrieval Tool for FAFSA

IRS Data Retrieval Tool Step by Step Instructions

The step by step instructions assumes that you have already submitted a FAFSA and is meant to help you update your FAFSA using the online IRS Data Retrieval Tool.

Step 1: Go to www.fafsa.gov and click “Login”.

The screenshot shows the FAFSA website homepage. At the top left, it says "Federal Student Aid" with the tagline "An OFFICE of the U.S. DEPARTMENT of EDUCATION". To the right, it says "PROUD SPONSOR of the AMERICAN MIND™". Further right, it says "FAFSA™ Free Application for Federal Student Aid". Below this is a navigation bar with icons for Home, About Us, PIN Site, StudentAid.gov, and Help. There is also a search bar with a "SEARCH" button and language options for "English" and "Español". A large blue banner reads "Get help paying for college" and "Submit a Free Application for Federal Student Aid (FAFSA)". Below the banner is a photo of four diverse college students. At the bottom, there are two columns: "New to the FAFSA?" with a "Start A New FAFSA" button, and "Returning User?" with a list of options: "Make a correction", "Add a school", and "View your Student Aid Report (SAR), and more...", followed by a "Login" button.

Step 2: Enter your FSA Username and Password and click “Next”.



SEARCH

STUDENT

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

OR

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

[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 the process).

Step 3: Read the disclaimer and click "Accept".



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 4: Click “Make FAFSA Corrections

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 Welcome, John Logout SEARCH

My FAFSA

Welcome, John Smith

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).


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: 10/01/2017 Processed: 10/01/2017
Latest Correction Submitted: 10/01/2017 Submitted By: Student Processed: 10/01/2017

FSA ID Last Time, Date FSA ID Used: 4:15, 10/01/2017

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](#)

NEED HELP?

Step 5: Create a Save Key and click “Next”.



SEARCH

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

STUDENT

Help and Hints

Create a Save Key

You must create a save key. The save key allows you to return to an application or correction later if you need to stop and save your work. It also allows you to share access to your application or correction if your parent needs to add information or sign.

The save key must be between 4 and 8 characters long. You can use any combination of numbers and / or uppercase and lowercase letters. For example, the save key "Student2" is different than the save key "sTuDeNt2."

Try to choose a save key that you can remember but that would be hard for

Step 6 Click on the "Financial Information" tab. Select "Already Completed" for the tax return filing status and answer the eligibility questions.

Help

SEARCH

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

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Parent Tax Information

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

✓ Application was successfully saved.

For 2016, has your father completed his IRS income tax return or another tax return?

For 2016, what is your father's tax filing status according to his tax return?

Did you, the father, 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](#)

PREVIOUS
NEXT

[NEED HELP?](#)
[SAVE](#)
[CLEAR ALL DATA](#)
[VIEW FAFSA SUMMARY](#)
[EXIT](#)

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 7: If you are eligible to use the IRS Data Retrieval Tool, you can now click on the “Link to IRS” button.

Step 8: Enter the parent’s FSA ID Username or Verified E-mail Address and FSA ID Password. Click “Proceed to IRS Site” to leave the FAFSA website and enter the IRS Data Retrieval Tool Website.



Help

SEARCH

Student Demographics

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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

[Create an FSA ID](#)

[Forgot Username](#)

[Forgot Password](#)

FSA ID 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.

SKIP IRS TRANSFER

PROCEED TO IRS SITE

Help and Hints

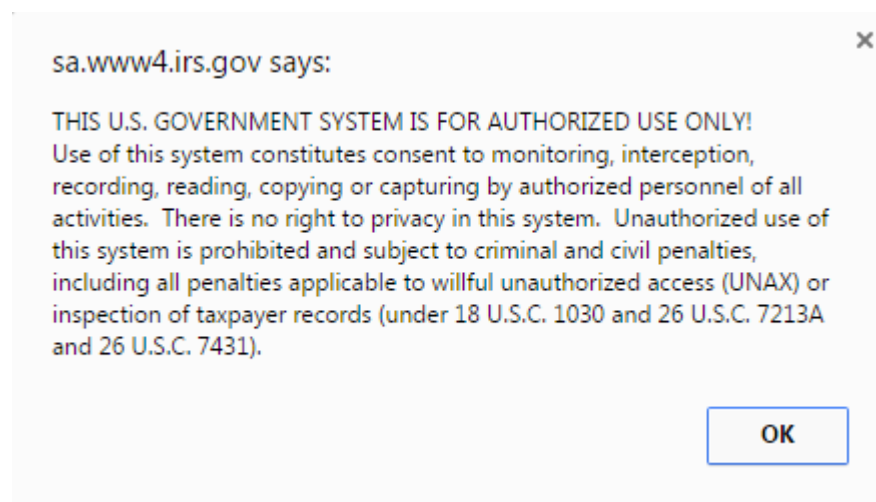
What is your (the parent's) FSA ID Username or Verified E-mail Address?

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](#).

Step 9: Click "Ok" to accept the IRS Data Retrieval Tool terms of use.



Step 10: 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 *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	*** - ** -
Date of Birth *	<input type="text"/> / <input type="text"/> / <input type="text"/>
Filing Status * ?	Single <input type="text"/>
Address - Must match your 2016 Federal Income Tax Return. ?	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <input type="text"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One <input type="text"/>
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.

[Return to FAFSA](#)

[Submit](#)

[IRS Privacy Policy](#)

Step 11: Review the information that the IRS has retrieved from your tax returns. Check the box to “Transfer my Tax Information into the FAFSA” and click “Transfer Now”. Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.

2016 Federal Income Tax Information


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 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.

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

- The tax information provided to FOTW 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.

Do Not Transfer 

[IRS Privacy Policy](#)

Step 12: Answer the additional questions and click "Next".



Help

SEARCH

Student Demographics

School Selection

Dependency Status

Parent Demographics

Financial Information

Sign & Submit

Confirmation

Parent Financial Information



You have successfully transferred your 2016 IRS tax information.

The father's 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 type of income tax return did your father file for 2016?

Transferred from the IRS

What was your father's adjusted gross income for 2016?

Transferred from the IRS

How much did your father earn from working (wages, salaries, tips, etc.) in 2016?

Transferred from the IRS

Did your father file an IRS Schedule K-1 (Form 1065) for 2016?

Yes No

As of today, is your father a dislocated worker?

Select ▼

PREVIOUS

NEXT

NEED HELP?

SAVE

CLEAR ALL DATA

VIEW FAFSA SUMMARY

EXIT

Help and Hints

Parent Filed IRS Schedule K-1 (Form 1065) for 2016?

IRS Schedule K-1 (Form 1065) is for tax filers who are self-employed.

Select **Yes** if your parent filed an IRS Schedule K-1 (Form 1065) for 2016.

Select **No** if your parent did not file an IRS Schedule K-1 (Form 1065) for 2016.

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NOTE: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Parent Financial Information Section and once under the Student Financial Information section before submitting the FAFSA.

Step 13: Continue to the "Sign & Submit" tab. Follow all of the instructions carefully to submit your FAFSA correction.

Sign With an FSA ID

Parent Signature - Sign With an FSA ID

Mother's/Stepmother's Social Security Number

XXX-XX-

Mother's/Stepmother's last name

Mother's/Stepmother's date of birth

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

[Create an FSA ID](#)

FSA ID Password

[Forgot Username](#)

[Forgot Password](#)

SIGN

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

[Create an FSA ID](#)

FSA ID Password

SIGN

[PREVIOUS](#)

[SUBMIT MY FAFSA NOW](#)

Help and Hints

Terms of Agreement - Parent

In order to submit your FAFSA, your parent must review the Terms of Agreement and select **Agree**.

[More>>>](#)

Remember to print or save the confirmation page for your records.