

FAFSA IRS Data Retrieval Tool Instructions

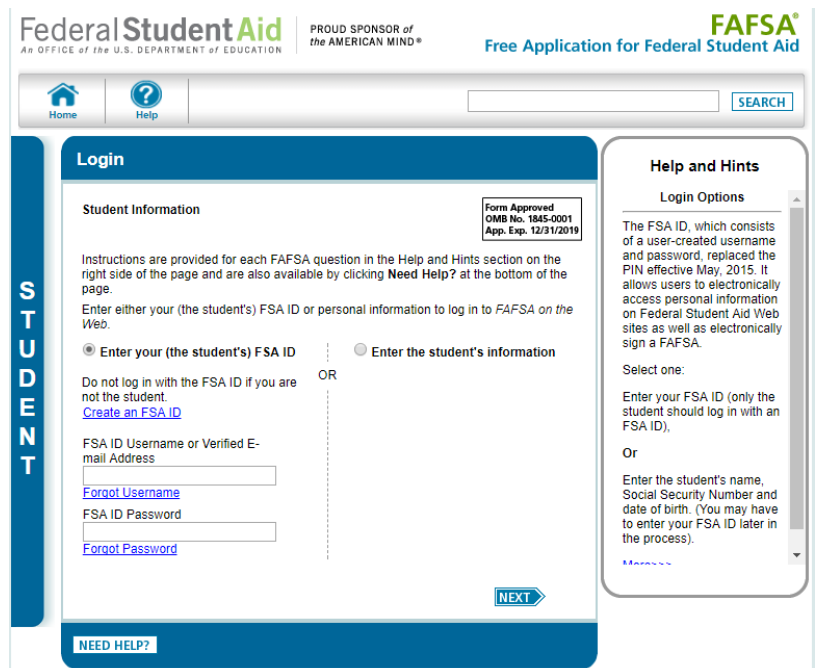
Easily transfer tax information using the IRS Data Retrieval Tool on the FAFSA. This saves time, confusion, and mistakes. When the IRS Data Retrieval tool is used, it stays with the FAFSA; schools will not require paper copies to be submitted.



The image shows the FAFSA home page. At the top, it says "Federal Student Aid" and "FAFSA Free Application for Federal Student Aid". Below this is a navigation bar with links: Home, About Us, FSA ID, StudentAid.gov, and Help. There is also a search bar. The main heading is "Get help paying for college" with the subtext "Submit a Free Application for Federal Student Aid (FAFSA)". Below this is a banner image showing four diverse students. Under the banner, there are two sections: "New to the FAFSA?" with a "Start A New FAFSA" button, and "Returning User?" with a list of links: "Make a correction", "Add a school", and "View your Student Aid Report (SAR), and more...". There is also a "Login" button.

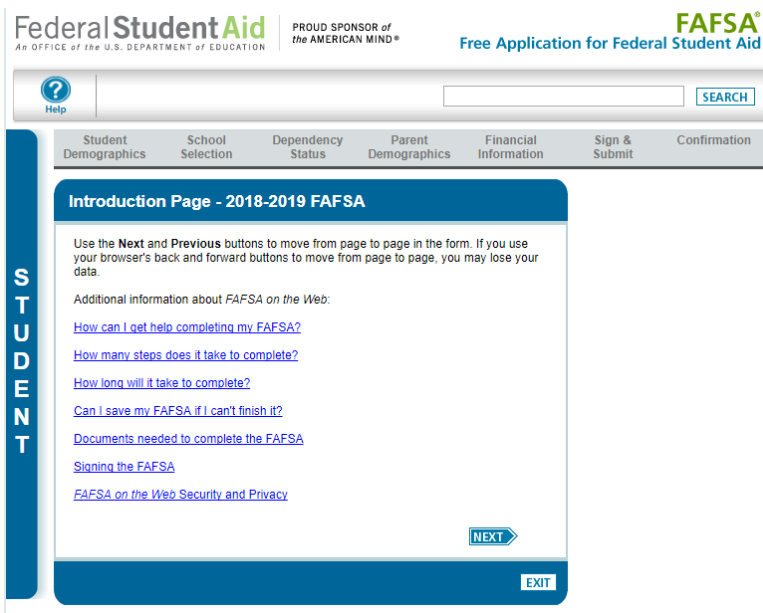
1. Go to
<https://www.fafsa.ed.gov>

2. Login using the FSA ID



The image shows the FAFSA login page. At the top, it says "Federal Student Aid" and "FAFSA Free Application for Federal Student Aid". Below this is a navigation bar with links: Home, Help, and a search bar. The main heading is "Login". On the left, there is a vertical "STUDENT" label. The login form has two options: "Enter your (the student's) FSA ID" and "Enter the student's information". The first option is selected. Below it, there are fields for "FSA ID Username or Verified E-mail Address" and "FSA ID Password". There are links for "Create an FSA ID", "Forgot Username", and "Forgot Password". A "NEXT" button is at the bottom right. On the right side, there is a "Help and Hints" section with "Login Options" explaining the FSA ID process.

3. Select next to continue with the FAFSA by entering data in the required fields.



The image shows the FAFSA introduction page. At the top, it says "Federal Student Aid" and "FAFSA Free Application for Federal Student Aid". Below this is a navigation bar with links: Home, Help, and a search bar. The main heading is "Introduction Page - 2018-2019 FAFSA". Below this is a banner image showing four diverse students. Under the banner, there is a list of links: "How can I get help completing my FAFSA?", "How many steps does it take to complete?", "How long will it take to complete?", "Can I save my FAFSA if I can't finish it?", "Documents needed to complete the FAFSA", "Signing the FAFSA", and "FAFSA on the Web Security and Privacy". There is a "NEXT" button at the bottom right and an "EXIT" button at the bottom left.

4. Select that you have already completed your tax return for 2016.

5. You will be prompted to LINK TO IRS

The screenshot shows the 'Parent Tax Information' section of the FAFSA application. A green box at the top indicates 'Application was successfully saved.' Below this, there are three questions with dropdown menus: 'For 2016, have your parents completed their IRS income tax return or another tax return?' (set to 'Already completed'), 'For 2016, what is your parents' tax filing status according to their tax return?' (set to 'Married-Filed Joint Return'), and 'Did you, the parents, file a Puerto Rican or foreign tax return for 2016?' (set to 'No'). A blue box with a grid icon and the text 'Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!' contains a 'LINK TO IRS' button. Navigation buttons at the bottom include 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. A 'Help and Hints' sidebar on the right provides additional guidance. The header includes 'Federal Student Aid' and 'FAFSA' logos, and the footer shows the date 'Site Last Updated: Sunday, October 1, 2017'.

The screenshot shows the 'Leaving FAFSA on the Web' screen. A red box highlights the warning: 'For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.' Below this, there are input fields for 'What is your (the parent's) FSA ID?' (FSA ID Username or Verified E-mail Address) and 'FSA ID Password'. There are links for 'Create an FSA ID', 'Forgot Username', and 'Forgot Password'. At the bottom, there are two buttons: 'SKIP IRS TRANSFER' and 'PROCEED TO IRS SITE'. The header includes 'Federal Student Aid' and 'FAFSA' logos, and the footer shows the date 'Site Last Updated: Sunday, October 1, 2017'.

6. The parent should then enter their FSA ID and click on the link that says 'Proceed to the IRS site'

7. You will be notified that you are leaving the FAFSA website. You will be taken to an IRS page where you will enter your information.

This is a repeated screenshot of the 'Leaving FAFSA on the Web' screen. It shows the same warning message in a red box: 'For your protection, your tax return information will not display on the IRS Web site or on the FAFSA. Click Proceed to IRS Site to continue. Otherwise, click Skip IRS Transfer.' Below the warning, there are input fields for FSA ID and password, and links for creating an FSA ID or recovering credentials. At the bottom, the 'PROCEED TO IRS SITE' button is highlighted. The header and footer are identical to the previous screenshot.

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 2016 Federal Income Tax Return. [Required fields *](#)

First Name *	GDIT
Last Name *	DATA
Social Security Number *	
Date of Birth *	
Filing Status *	
Address - Must match your tax return	
Street Address *	
P.O. Box (Required if you are using a P.O. Box)	
Apt. Number (Required if you are using an apartment)	
Country *	
City, Town or Post Office *	
State/U.S. Territory *	
ZIP Code *	

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](#)

8. Enter the information EXACTLY as it appeared on your tax return. DO NOT use punctuation. E.g. If your tax returns say your address is '1889 Perimeter Drive' but you enter '1889 Perimeter Dr.' you will receive an error message.

9. Make sure to transfer the information by clicking the 'Transfer Now' link.

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2016 Federal Income Tax Information

Gditi Data

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.

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.

[Transfer Now](#) [Do Not Transfer](#)

[IRS Privacy Policy](#)

Federal Student Aid [FAFSA](#) [Free Application for Federal Student Aid](#)

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[Student Demographics](#) [School Selection](#) [Dependency Status](#) [Parent Demographics](#) [Financial Information](#) [Sign & Submit](#) [Confirmation](#)

Student Financial Information

You have successfully transferred your 2016 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 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

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

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

Site Last Updated: Sunday, October 1, 2017 [Download Adobe Reader](#)

Privacy

10. After the tax information is transferred from the IRS, continue with the FAFSA to completion with both student & parent signatures (using the FSA ID).