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.

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

2. Login using the FSA ID. The steps are similar for both student or parent.

3. Continue filling out the required fields and select next to progress through the FAFSA until you reach the financial information tab.
4. Select that you have already completed your tax return for 2017.

5. You will see a prompt to LINK TO IRS in the IRS Data Retrieval Tool dialog box.

6. The parent should enter their FSA ID then click NEXT. They will be prompted to click ‘Proceed to IRS site’ on the next slide.

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.
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. You must click the checkbox next to “Transfer my tax information” then make sure you click the ‘Transfer Now’ button. Your information will not be transferred if you miss this step.

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).