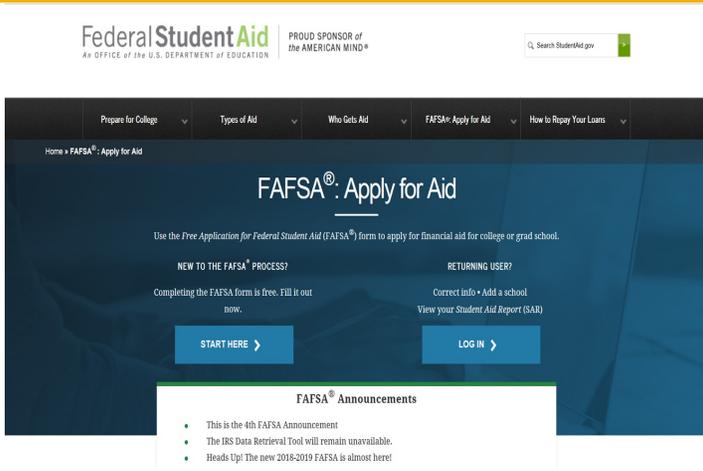


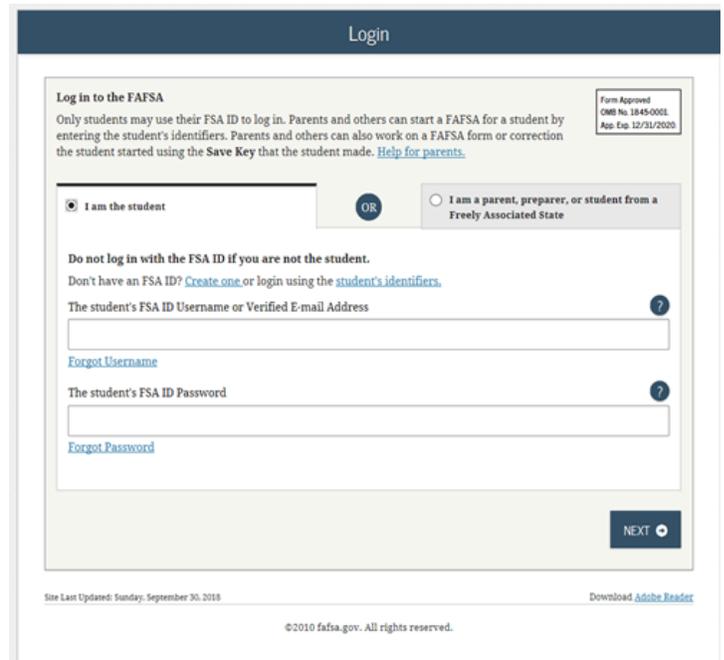
# FAFSA IRS Data Retrieval Tool Instructions

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.

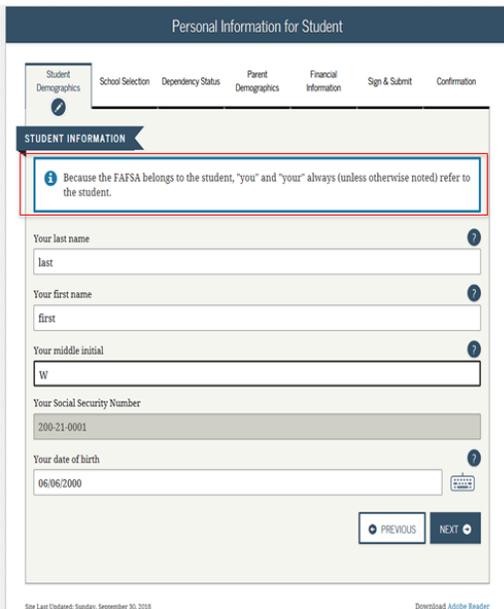


1. Go to <https://www.fafsa.ed.gov>

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

The screenshot shows the 'Parent Tax Filing Status' page. At the top, a progress bar indicates the following steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Financial Information' step is currently active. Below the progress bar, a green message box states 'Application was successfully saved.' A blue information box with a question mark icon contains the text: 'Attention! You must provide financial information from your parents' 2017 tax return on the following pages.' Below this, there are three questions with dropdown menus and radio buttons: 'For 2017, have your parents completed their IRS income tax return or another tax return?' with 'Already completed' selected; 'For 2017, what is your parents' tax filing status according to their tax return?' with 'Married-Filed Joint Return' selected; and 'Did your parents file a Puerto Rican or foreign tax return for 2017?' with 'No' selected. At the bottom of the form, there is a dark blue button labeled 'LINK TO IRS' and a 'PREVIOUS' button.

The screenshot shows the 'Parent Log In to IRS DRT' page. At the top, a progress bar indicates the following steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Financial Information' step is currently active. Below the progress bar, a blue header reads 'PARENT INFORMATION'. The main text says: 'You, the parent, should enter the information below and click Next to continue. Otherwise, click Skip IRS DRT. If you have any questions or problems using this tool, click FAFSA Help for assistance.' Below this, there is a section titled 'Provide Parent's FSA ID' with a question mark icon. It asks 'Which parent are you?' with radio buttons for 'Parent 1' (selected) and 'Parent 2'. Below that is a text input field for 'Parent's FSA ID Username or Verified E-mail Address' containing 'Pas0002'. There are links for 'Forgot Username' and 'Create an FSA ID'. Below that is a password input field for 'Parent's FSA ID Password' with a question mark icon and a 'Forgot Password' link. At the bottom right, there are 'SKIP IRS DRT' and 'NEXT' buttons.

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.

The screenshot shows the 'Parent Leaving FAFSA' page. At the top, a progress bar indicates the following steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Financial Information' step is currently active. Below the progress bar, a blue header reads 'PARENT INFORMATION'. The main text says: 'Leaving FAFSA on the Web. You, the parent, are now leaving FAFSA on the Web and will be transferred to the IRS Web site. 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.' Below this text, there are two buttons: 'SKIP IRS DRT' and 'PROCEED TO IRS SITE'. At the bottom left, there is a link for 'Show Application Data'. At the bottom of the page, there is a footer with the text: 'Site Last Updated: Sunday, September 30, 2016', 'Download Adobe Reader', and '©2010 fafsa.gov. All rights reserved.'

Return to FAFSA | Log Out | Help

IRS.gov

Español

### Get My Federal Income Tax Information

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

Enter the following information from your 2017 Federal Income Tax Return. Required fields \*

First Name *	GDI
Last Name *	data
Social Security Number *	***-**-2614
Date of Birth *	01 / 01 / 1999
Filing Status *	Married-Filed Joint Return
Address - Must match your 2017 Federal Income Tax Return. <span>?</span>	
Street Address *	4050 alpha rd test
P.O. Box (Required if entered on your tax return) <span>?</span>	
Apt. Number (Required if entered on your tax return)	
Country *	United States
City, Town or Post Office *	farmers ranch
State / U.S. Territory *	Texas (TX)
ZIP Code *	75244

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

[IRS Privacy Policy](#)

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.

Return to FAFSA | Log Out | Help

IRS.gov

Español

### 2017 Federal Income Tax Information

Get 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 U.S. Department of Education (ED) to populate any applicable FAFSA<sup>®</sup> 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 the 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.

Transfer Now Do Not Transfer

[IRS Privacy Policy](#)

Parent Questions for Tax Filers Only

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

**PARENT INFORMATION**

Did your parents have any of the following items in 2017? Enter amounts for all that apply.

Combat pay or special combat pay. Only enter the amount that was taxable and included in your parents' adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in Box 12, Code Q ?

\$  .00

Student college grant and scholarship aid reported to the IRS in your parents' income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships ?

\$  .00

Education credits (American Opportunity Tax Credit or Lifetime Learning Tax Credit) from IRS Form Transferred from the IRS ?

IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form Transferred from the IRS ?

Tax exempt interest income from IRS Form Transferred from the IRS ?

Untaxed portions of IRA distributions from IRS Form Transferred from the IRS ?

Untaxed portions of pensions from IRS Form Transferred from the IRS ?

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).