

# IRS Data Retrieval Tool

## Section 1: How to Use the IRS Data Retrieval Tool

1. Go to [www.fafsa.gov](http://www.fafsa.gov) and click "Login"
2. Enter your FSA ID and Password and click "Next"
3. Create a "Save Key" and click "Next"
4. Click on the "Financial Information" tab \*

The screenshot shows the 'Financial Information' tab selected in the top navigation bar. The main content area is titled 'Student Tax Information'. It includes an information icon and a message: 'Attention! You must provide financial information from your 2016 tax return on the following pages.' Below this is a green checkmark and the message 'Application was successfully saved.' The next question is 'For 2016, have you completed your IRS income tax return or another tax return?' with a dropdown menu currently showing 'Select'. At the bottom of the form are buttons for 'PREVIOUS', 'NEXT', 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. A vertical 'STUDENT' label is on the left side of the form.

\*If a dependent the Parent Tax Information screen will show first. To use the Data Retrieval tool for the STUDENT ONLY, press "next" at the bottom of the Parent Tax Info page.

5. Correctly answer questions from the drop down box by clicking on the down arrow.

This screenshot shows the 'Financial Information' tab selected. The 'Student Tax Information' section contains an attention message, a success message, and two questions. The first question is 'For 2016, have you completed your IRS income tax return or another tax return?' with a dropdown menu showing 'Already completed'. The second question is 'For 2016, what is your tax filing status according to your tax return?' with a dropdown menu showing 'Married-Filed Joint Return'. Below these questions are radio buttons for 'Did you file a Puerto Rican or foreign tax return for 2016?' with 'Yes' and 'No' options. At the bottom of the form is a button labeled 'LINK TO IRS'. A vertical 'STUDENT' label is on the left side of the form.

Click the "Link to IRS" button to proceed.

6. The next screen will appear. Click on "Proceed To IRS Site"

**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.**

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](#)

7. Click on "OK"

**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 \*** **Last Name \*** **Social Security Number \*** **Date of Birth \*** **Filing Status \*** **Address - Must match your tax return**

**Street Address \*** **P.O. Box (Required if you use a P.O. Box) \*** **Apt. Number (Required if you live in an apartment) \*** **Country \*** **City, Town or Post Office \*** **State/U.S. Territory \*** **ZIP Code \***

**Message from webpage**

**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**

8. Verify personal information already populated. Then you will need to add your address information exactly as submitted on your 1040 Tax Filing. Then 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 2016 Federal Income Tax Return. [?](#) Required fields \*

First Name *	<input type="text"/>	← Your first name will appear here
Last Name *	<input type="text"/>	← Your last name will appear here
Social Security Number *	<input type="text"/>	← Your Social Security Number will appear here
Date of Birth *	<input type="text"/>	← Your birth date will appear here
Filing Status * <a href="#">?</a>	<input type="text"/>	← Verify filing status here
Address - Must match your 2016 Federal Income Tax Return. <a href="#">?</a>		
Street Address *	<input type="text"/>	
P.O. Box (Required if entered on your tax return) <a href="#">?</a>	<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 *	Illinois (IL) <input type="text"/>	
ZIP Code *	<input type="text"/>	

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

9. To transfer your tax information to your FAFSA click in this box then click "Transfer Now"

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Return to FAFSA | Log Out | Help

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### 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 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 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 your 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 [?](#)

10. You will then be returned to your FAFSA application with the following messages in areas where tax information was transferred in from the IRS.

The screenshot displays the FAFSA application interface. At the top, a navigation bar includes tabs for Student Demographics, School Selection, Dependency Status, Parent Demographics, and Financial Information. The 'Financial Information' tab is active. Below this, a blue header reads 'Student Financial Information'. A message box with an information icon states: '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.' Below the message, several questions are listed, each followed by the text 'Transferred from the IRS': 'What income tax return did you file for 2016?', 'What was your (and your spouse's) adjusted gross income for 2016?', 'How much did you earn from working (wages, salaries, tips, etc.) in 2016?', and 'How much did your spouse earn from working (wages, salaries, tips, etc.) in 2016?'. There are input fields for these questions, some showing '.00'. A question 'As of today, are you (or your spouse) a dislocated worker?' has a 'Select' dropdown menu. At the bottom, there are navigation buttons: 'PREVIOUS', 'NEXT', 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. Two black arrows point from the text in step 10 to the message box and the 'Transferred from the IRS' text in the questions.

Student Demographics School Selection Dependency Status Parent Demographics Financial Information

**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 (and your spouse's) adjusted gross income for 2016?  
**Transferred from the IRS**

How much did you earn from working (wages, salaries, tips, etc.) in 2016?  
\$  .00

How much did your spouse earn from working (wages, salaries, tips, etc.) in 2016?  
\$  .00

As of today, are you (or your spouse) a dislocated worker?  
Select

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

11. Proceed with completing our FAFSA.