

IRS Data Retrieval Tool for FAFSA

Starting with the 2017-2018 school year the FAFSA now allows students to file with “prior prior year” tax information. For 2017-2018 this means students and their families will submit 2015 tax return information. The quickest and most accurate way to transfer tax information to the FAFSA is through use of the IRS Data Retrieval Tool.

****Please note that some of the screen shots used in these directions may show previous school years. To update your 2017-2018 FAFSA information, be sure you always choose tabs or drop-downs that say 2017-2018 FAFSA or 2015 Tax Year.****

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

The screenshot shows the FAFSA website homepage. At the top, it says "Federal Student Aid" and "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. A search bar is also present. 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. The page is divided into 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...". A green "Login" button is located to the right of the list, and an orange arrow points to it from the right side of the page.

Step 2: Enter your FSA username and password and click “Next.”

Federal Student Aid | PROUD SPONSOR of the AMERICAN MIND® | Free Application

Home | Help

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 OR **Enter the student's information**

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?

STUDENT

Step 3: Click “Make FAFSA Corrections.” Be sure to be on the correct Year for your FAFSA

My FAFSA

Welcome

2013-2014 | 2012-2013

Current Application Status: Processed Successfully Original Application Submitted: 02/06/2013 Processed: 02/07/2013 DRN: 7503

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).

VIEW PROCESSED INFORMATION (PDF VERSION)

VIEW PROCESSED INFORMATION (HTML VERSION)

You can also:

- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA.

STUDENT

Step 4: Create a Save Key and click "Next."

The screenshot shows the Federal Student Aid website interface. At the top left, the logo reads "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®" and "Free Application". Below the logo is a "Help" button with a question mark icon. A navigation bar contains five tabs: "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", and "Financial Information". The main content area is titled "Introduction Page - 2016-2017 FAFSA". It contains the following text: "Use the **Next** and **Previous** buttons to move from page to page in the form. If you use your browser's back and forward buttons to move from page to page, you may lose your data." Below this is a section "Additional information about FAFSA on the Web:" followed by several blue hyperlinks: "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". At the bottom right of the content area is a "NEXT" button with a right-pointing arrow. At the bottom right of the entire page is an "EXIT" button. On the left side of the page, the word "STUDENT" is written vertically in white capital letters on a blue background.

Step 5: Click on the “Financial Information” tab. Select “Already Completed” for the 2015 tax return filing status and answer the eligibility questions.

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION | PROUD SPONSOR of the AMERICAN MIND® | Free Application

Help

Student Demographics | School Selection | Dependency Status | Parent Demographics | **Financial Information**

STUDENT

Student Tax Information

Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?
Already completed

For 2015, what is your tax filing status according to your tax return?
Married-Filed Joint Return

To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):

Did you file a Form 1040X amended tax return?
 Yes No

Did you file a Puerto Rican or foreign tax return?
 Yes No

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
 Yes No

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address [Forgot Username](#)

FSA ID Password [Forgot Password](#)

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Step 6: If you are eligible to use the IRS Data Retrieval Tool, you can now click on the LINK TO IRS button. If you are not eligible to use the IRS Data Retrieval Tool follow, [these instructions](#) to order a tax return transcript.

Step 7: Click "OK" to leave the FAFSA website and enter the IRS Data Retrieval Tool website.

The screenshot shows the FAFSA website interface. At the top, it says "Federal Student Aid" and "PROUD SPONSOR of the AMERICAN MIND™". The "FAFSA™" logo is on the right, with the text "Free Application for Federal Student Aid" below it. A search bar is visible. The navigation menu includes "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Financial Information" tab is selected. The main content area displays a message titled "Leaving FAFSA on the Web".

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 information will be saved and your *FAFSA on the Web* session will end.

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.

Click OK to continue. Otherwise, click Cancel.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

Step 8: Click "OK" to accept the IRS Data Retrieval Tool terms of use.

The screenshot shows a Windows-style dialog box titled "The page at https://sa2.www4.irs.gov says:". The text inside the dialog box reads:

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).

Step 9: Enter the requested information and click "Submit." Remember to enter your address exactly as it appeared when you filed your taxes.

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 2015 Federal Income Tax Return. ? Required fields *

First Name *	Dependent
Last Name *	Data
Social Security Number *	*** - ** - 2581
Date of Birth *	01 / 01 / 1994
Filing Status * ?	Single
Address - Must match your 2015 Federal Income Tax Return. ?	
Street Address *	
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	
Country *	United States
City, Town or Post Office *	
State/U.S. Territory *	Select One
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.


Step 10: Review the information that the IRS has retrieved from your tax returns. Check the box to "Transfer My Tax Information to the FAFSA" and click "Transfer Now." Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.

IRS.gov [Return to FAFSA](#) | [Log Out](#) | [Help](#) [Español](#)


Student 2015 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers ?
Tax Year	2015	
Name(s)	Dependent Data	
Social Security Number	*** - ** - 2581	
Filing Status	Single	Question 34 on the FAFSA
Type of Tax Return Filed	1040EZ	Question 33 on the FAFSA
Adjusted Gross Income	\$9,750	Question 36 on the FAFSA
Income Earned From Work ?	\$20,125	Question 39 on the FAFSA
Income Tax	\$7,025	Question 37 on the FAFSA
IRS Exemptions	5	Question 38 on the FAFSA

 Print this page to save records before choosing an option below.

Transfer My Tax Information into the FAFSA ?

The tax information provided above 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. You may still use this tax information to input the data into your FAFSA. ?

[IRS Privacy Policy](#)

Step 11: Do not update any answers that say “Transferred from the IRS: or your school may require you to supply additional documentation. Answer the question(s) asking how much was earned in wages, salaries, and tips and click “Next.”

**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 Student Financial Information section and once under the Parent Financial Information section before submitting the FAFSA.*

Step 12: Continue to the “Sign & Submit” tab. Follow all of the instructions carefully to submit your FAFSA correction.