IRS Data Retrieval Instructions

Step 1: Go to [www.fafsa.gov](http://www.fafsa.gov) and click “Login.”

New to the FAFSA?  
Start A New FAFSA

Returning User?  
- Make a correction
- Add a school
- View your Student Aid Report (SAR), and more...

[FAFSA](https://www.fafsa.gov) - Free Application for Federal Student Aid

Get help paying for college
Submit a Free Application for Federal Student Aid (FAFSA)
Step 2: Enter your FSA Username and Password and click “Next.”
Step 3: Click “Make FAFSA Corrections.”

Current Application Status: Processed Successfully
Congratulations, your FAFSA was successfully processed.

What Happens Next
• Your FAFSA information was made available to the school(s) 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).

You can also:
• View or Print your Student Aid Report (SAR)
• Make FAFSA Corrections to make a change, add a school, or transfer IRS data into your FAFSA

FSA ID

FSA ID Status:
Create an FSA ID
There is no FSA ID on file for the information you entered.

Create a shareable file with some of your student information.
Learn More
Step 4: Create a Save Key and click “Next.”
Step 5: Click on the “Financial Information” tab. Select “Already Completed” for the tax return filing status and answer the eligibility questions.

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 website.

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, review available Help options for assistance.

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

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

<table>
<thead>
<tr>
<th>First Name</th>
<th>Dependent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Data</td>
</tr>
<tr>
<td>Social Security Num</td>
<td>- - - 2541</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>01 / 01 / 1994</td>
</tr>
<tr>
<td>Filing Status</td>
<td>Single</td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>P.O. Box</td>
<td></td>
</tr>
<tr>
<td>Apt. Number</td>
<td></td>
</tr>
<tr>
<td>City, Town, or Post</td>
<td>United States</td>
</tr>
<tr>
<td>State, U.S. Territory</td>
<td>Select One</td>
</tr>
<tr>
<td>ZIP Code</td>
<td></td>
</tr>
</tbody>
</table>

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.

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

### 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.

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>My Tax Information</th>
<th>FAFSA Question Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2015</td>
<td></td>
</tr>
<tr>
<td>Name(s)</td>
<td>Dependent Data</td>
<td></td>
</tr>
<tr>
<td>Social Security Number</td>
<td><strong>--</strong> - 2501</td>
<td></td>
</tr>
<tr>
<td>Filing Status</td>
<td>Single</td>
<td>Question 34 on the FAFSA</td>
</tr>
<tr>
<td>Type of Tax Return Filed</td>
<td>1040EZ</td>
<td>Question 33 on the FAFSA</td>
</tr>
<tr>
<td>Adjusted Gross Income</td>
<td>$9,750</td>
<td>Question 36 on the FAFSA</td>
</tr>
<tr>
<td>Income Earned From Work</td>
<td>$20,125</td>
<td>Question 39 on the FAFSA</td>
</tr>
<tr>
<td>Income Tax</td>
<td>$7,025</td>
<td>Question 37 on the FAFSA</td>
</tr>
<tr>
<td>IRS Exemptions</td>
<td>5</td>
<td>Question 38 on the FAFSA</td>
</tr>
</tbody>
</table>

- **Print this page for your 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 ](https://www.irs.gov/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 additional questions 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.

Remember to print or save the confirmation page for your records.