

Using the IRS Data Retrieval Tool

The 2018-2019 IRS Data Retrieval Tool allows most users (students and parents) to securely transfer specific federal tax return information to the FAFSA. Users will see, “**Transferred from the IRS**” to confirm the data is included on the FAFSA.

Log into your FAFSA using student’s FSA ID and password: www.fafsa.gov

Click on Financial Information and answer the questions to Link to the IRS

Fill in required fields and click submit

Select the Transfer My Tax Information into the FAFSA option to transfer information to your FAFSA. Complete for both student and parent. **Sign and submit your FAFSA for processing.**

The screenshot shows the Federal Student Aid login page. It includes a navigation bar with 'Home' and 'Help' icons, and a 'Free Application' button. The main heading is 'Login'. Below this, there are sections for 'Student Information' and 'Enter your (the student's) FSA ID'. The 'Enter your (the student's) FSA ID' section has two radio buttons: 'Enter the student's information' (selected) and 'Enter the student's information' (unselected). There are input fields for 'FSA ID Username' and 'FSA ID Password', and a 'Next' button at the bottom right.

The screenshot shows a confirmation page for the IRS Data Retrieval Tool. It features a blue box with an information icon and the text: 'Attention! You must provide financial information from your 2016 tax return on the following pages.' Below this is a green box with a checkmark and the text: 'Application was successfully saved.' There are two questions: 'For 2016, have you completed your IRS income tax return or another tax return?' with a dropdown menu set to 'Already completed', and 'For 2016, what is your tax filing status according to your tax return?' with a dropdown menu. A 'Link to IRS' button is at the bottom. Navigation buttons for 'PREVIOUS' and 'NEXT' are at the bottom right.

The screenshot shows the 'Get My Federal Income Tax Information' page. It has a heading 'Get My Federal Income Tax Information' and a sub-heading 'Enter the following information from your 2015 Federal Income Tax Return.' Below this are several input fields: 'First Name', 'Last Name', 'Social Security Number', 'Date of Birth', 'Filing Status', 'Address', 'Street Address', 'P.O. Box (Required if entered on your tax return)', 'Apt. Number (Required if entered on your tax return)', 'Country', 'City, Town or Post Office', 'State (U.S. Territory)', and 'ZIP Code'. There are 'Return to FAFSA' and 'Submit' buttons at the bottom.

The screenshot shows a page with two main options: 'Transfer My Tax Information into the FAFSA' and 'Do Not Transfer My Tax Information and Return to the FAFSA'. The 'Transfer My Tax Information into the FAFSA' option is selected. Below this option is a 'Transfer Now' button. The 'Do Not Transfer My Tax Information and Return to the FAFSA' option is unselected. Below this option is a 'Do Not Transfer' button. There is a 'Print this page for your records before choosing an option below.' link at the top. An 'IRS Privacy Policy' link is at the bottom.