Step-by-Step Instructions for Using the IRS Data Retrieval Tool on the FAFSA

To use the IRS data Retrieval Tool you must first file your tax return.
   If you filed your taxes electronically, then wait 1 to 2 weeks.
   If you mailed your taxes, then wait 6 to 8 weeks.

After that time period, log back into the FAFSA.
   Both you and your parent(s), if applicable, will need to detail to your separate financial information sections.
      This will start with question 32 for the student.
      This will start with question 79 for the student’s parent(s), if applicable.

1. When you get to the step for “Student/Parent Tax Information” you will be prompted to answer whether you have completed your tax return.

Use the drop-down menu to indicate that you/your parent’s IRS income tax return has been “Already Completed”.

2. Once you select this option, a box will appear letting you know that some filers are excluded from using the IRS Data Retrieval Tool.

You or your parents will be excluded from using the IRS Data Retrieval option if you indicate that any of the following apply.

- Your marital status changed after December 31, 2012
- You or they filed “married filing separately”
- You or they indicated “married” on the FAFSA but filed “head of household” on the tax return
- You or they filed an amended return
- You or they filed a foreign tax return

You may later be required to request a paper tax transcript from the IRS. You may contact them at 800-908-9946 to make the request for the IRS Federal Tax Transcript.

You will be offered to use the IRS Data Retrieval option if you report that “None of the above” exclusion criteria apply to you.
3. Another box will then appear prompting you to select your status (Student/Mother/Father/Step-Parent) and to enter your PIN.

Immediately after entering your PIN, click the “link to IRS” button.

4. If eligible to use the tool, you will be transferred to the IRS Website. You will then be notified that you are leaving the FAFSA website and entering the IRS website to complete the transfer of your tax information. Click ok.
5. On the IRS Web site, you will be prompted to enter information as it appears on your tax return.

It is important that you complete this section exactly as it appears on your tax return or your information may not match with IRS records and the data retrieval may not go through.

<table>
<thead>
<tr>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Joe</td>
</tr>
<tr>
<td>Last Name</td>
<td>Smith</td>
</tr>
<tr>
<td>Social Security Number</td>
<td>*** - ** - 6789</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>01 / 04 / 1990</td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>Apt. Number (Required if it appears on your tax return)</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
<tr>
<td>City, Town or Post Office</td>
<td></td>
</tr>
<tr>
<td>State/U.S. Territory</td>
<td>Select One</td>
</tr>
<tr>
<td>ZIP Code</td>
<td></td>
</tr>
<tr>
<td>Filing Status</td>
<td>Select One</td>
</tr>
</tbody>
</table>
6. Once the IRS has authenticated your identity, your IRS tax information will display.

You may then choose to transfer your information from the IRS into your FAFSA by checking the “Transfer My Tax Information into the FAFSA” and clicking “Transfer Now” button (see below).

After you have transferred your data, you will be returned to the FAFSA website to finish your application.

Make sure you do not change any of the financial data that was imported from the IRS Website.

Remember that both you and your parents (if applicable) will need to go through a separate authentication process when filling out the Financial Information sections of the FAFSA.
7. To submit your updated FAFSA containing your/your parent’s IRS data information you must click “submit my FAFSA now”.

Help and Hints
Are you a preparer?
A preparer is anyone who charges a fee for helping you fill out your FAFSA.
Typically high school counselors, school financial aid administrators, or other mentors do not charge a fee to help you complete your application, so they are not considered preparers unless you paid them for their services.
If you are a preparer, select Yes.

Sign & Submit
- Application was successfully saved.

VIEW OR PRINT YOUR FAFSA INFORMATION
- Yes
- No

How do you (the student) want to provide your signature?
- Sign Electronically With My PIN (Fastest)
- Print A Signature Page
- Submit Without Signature

READ BEFORE PROCEEDING
- I will not default or cause a federal student loan or other student financial aid to be repaid.
- I have not borrowed money on a federal student loan or other student financial aid to repay it.
- I have not accepted money that has been offered to me for a federal student loan or other student financial aid to repay it.
- I have not elected to defer repayment of any federal student loan or other student financial aid.
- I will not default on a federal student loan or other student financial aid.
- I will not lose eligibility for a federal student loan or other student financial aid.

By signing this application electronically using your Federal Student Aid PIN or by
Terms of Agreement - Student
- Agree
- Disagree

PREVIOUS SUBMIT MY FAFSA NOW

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT