

# 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 \*

STUDENT

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

**Student Tax Information**

**Attention!** You must provide financial information from your **2016 tax return** on the following pages.

Application was successfully saved.

For 2016, have you completed your IRS income tax return or another tax return?  
Select

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

\*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.

STUDENT

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

**Student Tax Information**

**Attention!** You must provide financial information from your **2016 tax return** on the following pages.

Application was successfully saved.

For 2016, have you completed your IRS income tax return or another tax return?  
Already completed

For 2016, what is your tax filing status according to your tax return?  
Married-Filed Joint Return

Did you file a Puerto Rican or foreign tax return for 2016?  
 Yes  No

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

LINK TO IRS

Click the “Link to IRS” button to proceed.

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

**Student Demographics** | **School Selection** | **Dependency Status** | **Parent Demographics** | **Financial Information** | **Sign & Submit** | **Confirmation**

**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.

7. Click on "OK"

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 *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	<input type="text"/>
Date of Birth *	<input type="text"/>
Filing Status * <span>?</span>	<input type="text"/>
Address - Must match your tax return	
Street Address *	<input type="text"/>
P.O. Box (Required if you use a P.O. Box)	<input type="text"/>
Apt. Number (Required if you live in an apartment building)	<input type="text"/>
Country *	<input type="text"/>
City, Town or Post Office	<input type="text"/>
State/U.S. Territory *	Select One <input type="text"/>
ZIP Code *	<input type="text"/>

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".

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

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 shows the 'Student Financial Information' section of the FAFSA application. At the top, there are navigation tabs: 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', and 'Financial Information'. The 'Financial Information' tab is active. Below the tabs is a blue header with the text 'Student Financial Information'. A message box with an information icon (i) contains the text: '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 box are several questions with their corresponding answers: 'What income tax return did you file for 2016?' with the answer 'Transferred from the IRS'; 'What was your (and your spouse's) adjusted gross income for 2016?' with the answer 'Transferred from the IRS'; 'How much did you earn from working (wages, salaries, tips, etc.) in 2016?' with a text input field containing '00'; 'How much did your spouse earn from working (wages, salaries, tips, etc.) in 2016?' with a text input field containing '.00'; and 'As of today, are you (or your spouse) a dislocated worker?' with a dropdown menu set to 'Select'. At the bottom of the form are navigation buttons: 'PREVIOUS', 'NEXT', 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. Two black arrows point from the top right of the page towards the message box and the 'Transferred from the IRS' responses.

11. Proceed with completing our FAFSA.