

FAFSA – IRS Data Retrieval Tool Instructions

The **IRS Data Retrieval Tool** allows FAFSA applicants and their parents the ability to connect their 2015 income tax information from the IRS to the FAFSA.

BENEFITS OF USING THE IRS DATA RETRIEVAL TOOL:

- Applicants can complete their FAFSA more easily and accurately.
- The tool will increase the accuracy in the awarding of student financial aid funds.
- Applicants selected for verification can use the tool to provide their information and avoid unnecessary processing delays.

WHO IS NOT ELIGIBLE TO USE THE IRS DATA RETRIEVAL TOOL?

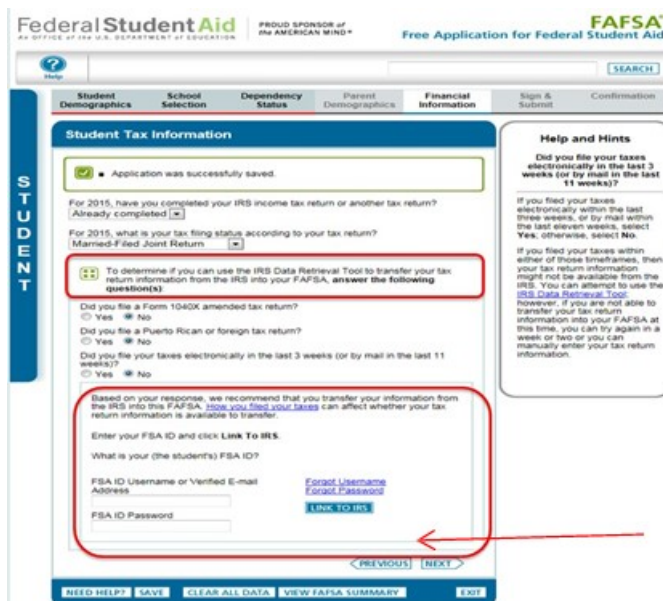
- Married couples who file separate tax returns.
- Applicants whose marital status has changed as of January 1, 2016
- Applicants who are neither eligible nor required to file a 2015 Federal Tax Return
- Parents who do not have a Social Security Number
- Applicants that indicated that they have not yet filed their 2015 Federal Tax Return
- Applicants or parents of applicants who have filed an amended tax return
- Applicants or parents who filed a foreign (or Puerto Rico) tax return.

Step-by-Step IRS Data Retrieval Tool Instructions

Please note that if you are using the IRS Data Retrieval Tool for both the student and the parent, you will have to complete the process twice, once under the Student Financial Information Section and once under the Parent Financial Information Section before submitting the FAFSA.

Step One: Click on the Financial Information Tab and select “Already Completed” for the tax return filing status and answer the eligibility questions.

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, you will need to request a paper transcript to be mailed to you. You can request a transcript at www.irs.gov/transcript.



The screenshot shows the FAFSA application interface for a student. The top navigation bar includes tabs for Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Financial Information' tab is active, and the 'Student Tax Information' section is displayed. A message indicates the application was successfully saved. The main content area contains several questions about tax filing status and the use of the IRS Data Retrieval Tool. A red box highlights the question: '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):' with radio button options for 'Yes' and 'No'. Below this, another red box highlights the 'LINK TO IRS' button, which is used to connect to the IRS Data Retrieval Tool. A red arrow points to this button. The bottom of the page features navigation buttons: NEED HELP?, SAVE, CLEAR ALL DATA, VIEW FAFSA SUMMARY, and EXIT.

Step Two: Once you select “LINK TO IRS” you will see the box below. Select “OK” to continue.

The screenshot shows the FAFSA website interface. At the top, it says 'Federal Student Aid' and 'Free Application for Federal Student Aid'. Below the navigation tabs, there is a section titled 'Leaving FAFSA on the Web'. The text explains that the user is being transferred to the IRS website and that their FAFSA information will be saved. It provides instructions on how to return to FAFSA and offers a 'Help' link. At the bottom, there are 'CANCEL' and 'OK' buttons, with a red arrow pointing to the 'OK' button.

Step Three: Click “OK to Select IRS Data Retrieval Tool Terms of Use.

The screenshot shows a warning dialog box from the IRS website. The title bar reads 'The page at https://sa2.www4.irs.gov says:'. The main text states: '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).' At the bottom right, there is an 'OK' button with a red arrow pointing to it.

Step Four: Enter the requested information and click “Submit”. The information, including address, must match the tax return exactly.

The screenshot shows the IRS 'Get My Federal Income Tax Information' form. The form is titled 'Get My Federal Income Tax Information' and includes a 'Return to FAFSA' link. It asks for the following information from the user's 2015 Federal Income Tax Return:

First Name *	Dependent
Last Name *	Date
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 *	

At the bottom, there are two buttons: 'Return to FAFSA' and 'Submit', with a red arrow pointing to the 'Submit' button.

Step Five: Review the information that the IRS has retrieved from the tax return. To complete the Data Transfer, click the box next to “Transfer My Tax Information Into the FAFSA” and then select “Transfer Now”.

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 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. **Transfer Now**

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. **Do Not Transfer**

[IRS Privacy Policy](#)

Step Six: Do not update any of the answers in the boxes where it indicates that the information was “Transferred from the IRS”. If you believe the information transferred is not correct, contact the Financial Aid Office before proceeding. If the information is correct, select “next” to proceed.

Federal Student Aid PROUD SPONSOR of the AMERICAN MIND® **FAFSA** Free Application for Federal Student Aid

Student Financial Information

You have successfully transferred your 2015 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.”

What income tax return did you file for 2015? **Transferred from the IRS**

IRS 1040A or 1040EZ

What was your adjusted gross income for 2015? This amount is found on IRS Form 1040A-line 21 or 1040EZ **Transferred from the IRS**

\$ 9,750.00

Your income earned from working (wages, salaries, tips, etc.) in 2015 was **transferred from the IRS**. This amount is found on IRS Form 1040A-line 7 or 1040EZ-line 1.

\$ 20,125.00

PREVIOUS **NEXT**

NEED HELP? **SAVE** **CLEAR ALL DATA** **VIEW FAFSA SUMMARY** **EXIT**

Help and Hints

Student's Type of 2015 Tax Form Used Question 33

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

If the answer to this question is not pre-filled, you must select the income tax return that you filed or will file for 2015:

- IRS 1040
- IRS 1040A or 1040EZ
- A foreign tax return
- A tax return for a U.S. territory or a Freely Associated State (including Puerto Rico).

Step Seven: Continue to “Sign and Submit” tab. Enter the required information, including the FSA ID User Name and Password. Once fully complete, select “Submit my FAFSA Now”.

Please Note:

If you are a Dependent Student, please remember to complete the IRS Data Retrieval Tool Process **twice**.

- Link **Student Taxes** to the FAFSA using the Data Retrieval Tool under the Student Financial Information (if student filed taxes).
- Link **Parent Taxes** to the FAFSA using the Data Retrieval Tool under the Parent Financial Information Section.

If you are selected for verification after your FAFSA has been processed, the Financial Aid Office will notify you of the documents you will be required to submit in order to process your financial aid award. Using the IRS Data Retrieval Tool does not eliminate the verification process or your responsibility to submit the requested verification forms.

How to Obtain a Tax Return Transcript if I do not want to use the Data Retrieval Tool or I am not Eligible to Use the Data Retrieval Tool

If you need to obtain a Tax Return Transcript from the IRS because you cannot use the DRT, you can order one online by visiting <http://www.irs.gov/Individuals/Get-Transcript> or you can call the IRS at 1-800-908-9946 to request by phone. You can also request a Tax Return Transcript in person at a local IRS Office.

Welcome to Get Transcript

[Español](#) | [中文](#) | [한국어](#) | [TiếngViệt](#) | [Русский](#)

You can get various [transcript types](#) online or by mail. If you need your prior year **Adjusted Gross Income (AGI)** to e-file, choose the **tax return transcript** type when making your request.

The method you used to file your tax return, e-file or paper, and whether you had a balance due, affects your [current year transcript availability](#). **Note:** If you need a photocopy of your return, you must use [Form 4506](#).

Get Transcript ONLINE

What You Need
To register and use this service, you need:

- your [SSN](#), date of birth, filing status and mailing address from latest tax return,
- access to your email account,
- your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- a mobile phone with your name on the account.

What You Get

- View, print or download your transcript
- [Transcript types](#) available online
- Username and password to return later

Get Transcript by MAIL

What You Need
To use this service, you need your:

- [SSN](#) or [Individual Tax Identification Number \(ITIN\)](#),
- date of birth, and
- mailing address from your latest tax return

What You Get

- Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you
- [Transcript types](#) available by mail

Related Forms

- › Form 4506, Request for Copy of Tax Return
- › Form 4506-T, Request for Transcript of Tax Return
- › Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript
- › Formulario 4506T-EZ (SP), Formulario Abreviado para la Solicitud de un Trasunto de la Declaracion de Impuestos Personales

Related Websites

- › Social Security Administration (SSA) - My Account
- › Free Application for Federal Student Aid (FAFSA)

Visit our [Get Transcript frequently asked questions \(FAQs\)](#) for more information.

To Request a Tax Return Transcript by Mail

Step One: To request for a transcript to be mailed to you, you must click “**Get Transcript by MAIL.**”

IRS.gov

Contact Us | Exit

Get Transcript by Mail [En Español](#) | [Privacy Notice](#)

All fields are required

Social Security Number (SSN) or Individual Tax ID Number (ITIN) [?](#)

- -

Date of Birth

Day Month


Street Address [?](#)

ZIP or Postal Code [?](#)

Continue

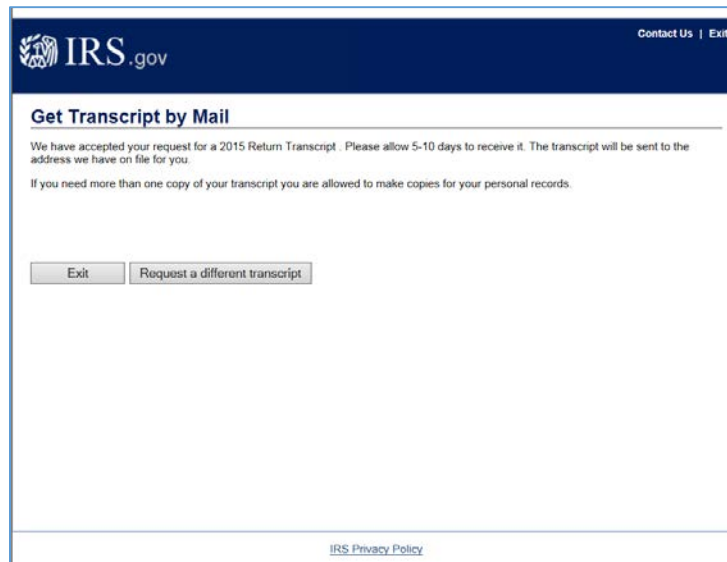
You must enter your information exactly as it appears on your federal tax return. Then, click **Continue**.

Step Two: For **Type of Transcript**, select **Return Transcript**. Please enter the appropriate **Federal Tax Year** and click **Continue**.



The screenshot shows the IRS website's 'Get Transcript by Mail' page. At the top left is the IRS logo and '.gov' text. At the top right are links for 'Contact Us' and 'Exit'. The main heading is 'Get Transcript by Mail'. Below this, there are two dropdown menus: 'Type of Transcript' with 'Return Transcript' selected, and 'for Tax Year' with '2015' selected. A 'Continue' button is positioned below the dropdowns. At the bottom center, there is a link for 'IRS Privacy Policy'.

Step Three: You will receive a confirmation screen upon submitting your information to the IRS. Once you receive your Transcript in the mail, please submit a copy to the Financial Aid Office with the **student's name and ID number** to prevent any processing delays.



The screenshot shows the IRS website's confirmation screen for a transcript request. At the top left is the IRS logo and '.gov' text. At the top right are links for 'Contact Us' and 'Exit'. The main heading is 'Get Transcript by Mail'. Below this, there is a confirmation message: 'We have accepted your request for a 2015 Return Transcript. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you.' Below the message, there is a note: 'If you need more than one copy of your transcript you are allowed to make copies for your personal records.' At the bottom, there are two buttons: 'Exit' and 'Request a different transcript'. At the bottom center, there is a link for 'IRS Privacy Policy'.