

## How to Transfer Your IRS Tax Information Directly into Your FAFSA

You may have received an email from Federal Student Aid recommending that you use the IRS Data Retrieval Tool to transfer tax information directly from the IRS into your FAFSA. If for any reason the Data Retrieval Tool is unavailable, you can manually enter your tax information into your FAFSA.

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. To use the Data Retrieval Tool, complete the following steps:

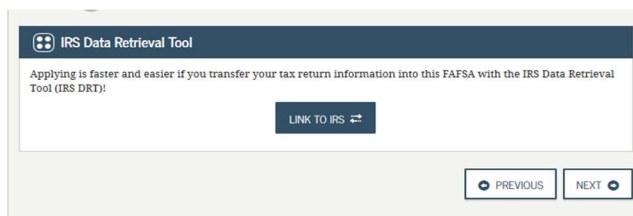
- Go to <https://studentaid.gov/h/apply-for-aid/fafsa>
- Log in using your FSA ID
- Select the “Continue” or “Make a Correction” button
- Select the "Financial Information" tab from the top of the page.

### Instructions for the parent to request the parent IRS information:

1. Go to "Parent Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, select which parent is providing information on the FAFSA
4. Enter the FSA ID for the parent providing the information
5. Click "Link to IRS" (for an example of screen shots from the IRS DRT, see student section below)
6. For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see “Transferred from the IRS” in the appropriate fields on fafsa.gov, the IRS DRT web page, and on the *Student Aid Report*.
7. If you only need to update the parent tax information, then proceed to the Sign and Submit page.

### Instructions for the student to request the student IRS information:

1. Go to "Student Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool



3. If eligible, click "Link to IRS"

**Student Leaving FAFSA**

[Student Demographics](#) | [School Selection](#) | [Dependency Status](#) | [Parent Demographics](#) | [Financial Information](#) | [Sign & Submit](#) | [Confirmation](#)

**STUDENT INFORMATION**

**Leaving FAFSA on the Web**

You are now leaving FAFSA on the Web and will be transferred to the IRS Web site. 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.**

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**Student Leaving FAFSA**

[Student Demographics](#) | [School Selection](#) | [Dependency Status](#) | [Parent Demographics](#) | [Financial Information](#) | [Sign & Submit](#) | [Confirmation](#)

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**You are now leaving this page. Click "OK" to continue or click "Cancel" to stay on this page. Your FAFSA information will be saved if you choose to continue.**

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**IRS.gov** [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 2017 Federal Income Tax Return.** Required fields \*

|                     |                      |
|---------------------|----------------------|
| <b>First Name *</b> | <input type="text"/> |
| <b>Last Name *</b>  | <input type="text"/> |

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 (UNAW) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

|   |   |
|---|---|
| <b>P.O. Box</b><br><small>(Required if entered on your tax return)</small>    | <input type="text"/>                                  |
| <b>Apt. Number</b><br><small>(Required if entered on your tax return)</small> | <input type="text"/>                                  |
| <b>Country *</b>  | <b>United States</b> <input type="button" value="v"/> |
| <b>City, Town or Post Office *</b>  | <input type="text"/>                                  |
| <b>State / U.S. Territory *</b>   | <b>Select One</b> <input type="button" value="v"/>    |
| <b>ZIP Code *</b>   | <input type="text"/>                                  |

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.

## Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2017 Federal Income Tax Return. [?](#) **Required fields \***

|   |  |
|---|--|
| First Name *  | <input type="text"/>   |
| Last Name *   | <input type="text"/>   |
| Social Security Number *  | ***-**-****  |
| Date of Birth *   | <input type="text"/> / <input type="text"/> / <input type="text"/> |
| Filing Status <a href="#">?</a>   | Single <input type="button" value="v"/>                            |
| Address - Must match your 2017 Federal Income Tax Return. <a href="#">?</a> |  |
| Street Address *  | <input type="text"/>   |
| P.O. Box<br>(Required if entered on your tax return) <a href="#">?</a>      | <input type="text"/>   |
| Apt. Number<br>(Required if entered on your tax return)                     | <input type="text"/>   |
| Country *   | United States <input type="button" value="v"/>                     |
| City, Town or Post Office *   | <input type="text"/>   |
| State / U.S. Territory *  | Select One <input type="button" value="v"/>                        |
| ZIP Code *  | <input type="text"/>   |

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.



## 2017 Federal Income Tax Information

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

|                        |                         |                                    |
|------------------------|-------------------------|------------------------------------|
| Tax Year               | Type of Return Filed    | Untaxed Pensions                   |
| Name(s)                | Adjusted Gross Income   | Untaxed IRA Distributions          |
| Social Security Number | Income Earned from Work | Tax-exempt Interest Income         |
| Filing Status          | Income Tax              | IRA Deductions and Payments        |
| IRS Exemptions         | Education Credits       | Status of Amended Returns Received |

Refer to your tax records if you have a question about the values you reported.

Print this page for your records before choosing an option below.

### Transfer My Tax Information into the FAFSA Form [?](#)

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.

 [?](#)

### Do Not Transfer My Tax Information and Return to the FAFSA Form [?](#)

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 form.

 [?](#)

For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on [fafsa.gov](http://fafsa.gov), the IRS DRT web page, and on the *Student Aid Report*.

The screenshot displays the "Student IRS Info" page. At the top, a progress bar shows the following steps: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics (checked), Financial Information (current step, marked with a pencil icon), Sign & Submit, and Confirmation. A blue banner labeled "STUDENT INFORMATION" is positioned above a green-bordered box containing a success message: "You have successfully transferred your 2017 IRS tax information." Below this message, two questions are listed: "What income tax return did you file for 2017?" and "What was your adjusted gross income for 2017?". Both questions have the text "Transferred from the IRS" displayed below them. To the right of each question is a question mark icon. At the bottom of the main content area are "PREVIOUS" and "NEXT" buttons. The footer includes the text "Site Last Updated: Sunday, October 28, 2018", a link to "Download Adobe Reader", and the copyright notice "©2010 fafsa.gov. All rights reserved."

4. Proceed to the Sign and Submit page.

If you'd like to know more about the tool, [FinAid offers a in depth summary](#) on their website.