

2016-2017 - IRS Data Retrieval Tool for FAFSA

Data is available within 1-2 weeks of electronically filing your taxes or 6-8 weeks of filing a paper tax return. These instructions assume you have already filed your 2016-2017 FAFSA and have waited the appropriate length of time to access the tax information.

Step 1: Go to www.fafsa.gov and click “Login.”

Step 2: Enter your FSA Username and Password and click “Next.”

Step 3: Click “Make FAFSA Corrections.”

Step 4: Create a Save Key and click “Next.”

Step 5: Click on the “Financial Information” tab. Select “Already Completed” for the tax return filing status and answer the eligibility questions.

Student Tax Information

Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?
 Already completed

For 2015, what is your tax filing status according to your tax return?
 Married-Filed Joint Return

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):

Did you file a Form 1040X amended tax return?
 Yes No

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

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
 Yes No

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address: [Forgot Username](#) [Forgot Password](#)

FSA ID Password: [LINK TO IRS](#)

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Step 6: 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 follow, please proceed to section 2 of these instructions to obtain a Tax Transcript.

Step 7: Click “OK” to leave the FAFSA website and enter the IRS Data Retrieval Tool website.

Step 8: Click “OK” to accept the IRS Data Retrieval Tool terms of use.

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 information will be saved and your FAFSA on the Web session will end.

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.

Click OK to continue. Otherwise, click Cancel.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

CANCEL OK

Step 9: Enter the requested information and click “Submit.” Remember to enter your address *exactly* as it you filed your taxes.

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 2015 Federal Income Tax Return. [?](#) Required fields *

First Name *	Dependent
Last Name *	Data
Social Security Number *	*** - ** - 2581
Date of Birth *	01 / 01 / 1994
Filing Status * ?	Single
Address - Must match your 2015 Federal Income Tax Return. ?	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One
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.

[Return to FAFSA](#) [Submit](#)

Step 10: Review the information that the IRS has retrieved from your tax returns. Check the box to “Transfer My Tax Information into the FAFSA” and click “Transfer Now.” Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.



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.

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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.

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Step 11: Do not update any answers that say “Transferred from the IRS” or your school may require you to supply additional documentation. Answer the additional questions and click “Next.”

NOTE: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financial Information Section and once under the Parent Financial Information section before submitting the FAFSA.

Step 12: Continue to the “Sign & Submit” tab. Follow all of the instructions carefully to submit your FAFSA correction.

Remember to print or save the confirmation page for your records.



If you have filed an amended return, you are required to submit your signed 1040X form. You will also need to submit your tax return transcript **and** account transcript to the Financial Aid office. You cannot use the online Data Retrieval Tool.

How to obtain a Return Transcript from the IRS

Get Transcript by Mail:

1. Go to www.irs.gov
2. Under “Tool,” click “Get a tax transcript.”
3. Click “**Get Transcript by mail**” to order your Transcript



4. Click “Ok”
5. Enter requested information *exactly as it appears* on your tax return and click “Continue.”
6. Select “Return Transcript” and the correct year. **We are unable to use and Account Transcript for Verification purposes.**
7. Click Continue. You’re done! Your transcript will be mailed within 5 to 10 business days.