

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 and wait 1 – 2 weeks if you file electronically, or 6 – 8 weeks if you mail in your returns.

After that time period, log back into the FAFSA. Both you and your parent(s) (if applicable) will need to go to your separate financial information sections (question 32 for students and question 79 for parents).

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.

The screenshot shows the FAFSA website interface. At the top, there is a navigation bar with the FAFSA logo and the text "Free Application for Federal Student Aid". Below this is a search bar and a "SEARCH" button. The main content area is divided into several sections: "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Parent Demographics" section is currently active, and the "Parent Tax Information" sub-section is displayed. A green checkmark icon and a message box indicate that the application was successfully saved. Below this, there is a question: "For 2011, have your parents completed their IRS income tax return or another tax return?" with a dropdown menu set to "Select". Navigation buttons for "PREVIOUS" and "NEXT" are visible. On the right side, there is a "Help and Hints" section for "Parents Filed 2011 Income Tax Return? Question 79", which explains that the question asks whether parents have filed or will file a 2011 income tax return, and that if parents are now married (even if they were not married in 2011), the user should answer this question about them as well. A vertical "PARENT" label is on the left side of the form.

Use the drop-down menu to indicate that you/your parent’s IRS income tax return have 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.

START HERE
GO FURTHER
FEDERAL STUDENT AID

FAFSA®
Free Application for Federal Student Aid

Contact Us Browse Help

SEARCH

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

PARENT

Parent Tax Information

Application was successfully saved.

For 2011, have your parents completed their IRS income tax return or another tax return?
Already completed

You, the parents, may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Check all that apply or check **None of the above**.

You, the parents, filed as Married Filing Separately

You, the parents, filed as Head of Household

You, the parents, filed an amended tax return

You, the parents, filed a Puerto Rican or foreign tax return

You, the parents, recently filed taxes

Help and Hints

Parents Filed 2011 Income Tax Return?

Question 79

This question asks whether or not your parents have filed or will file a 2011 income tax return. If your [parents](#) are now married (even if they were not married in 2011), answer this question about them as

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, 2011
- 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 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 enter your PIN. Immediately after entering your PIN, click the “link to IRS” button.

RENT

For 2011, have your parents completed their 2011 income tax return or another tax return?

Already completed

You, the parents, may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Check all that apply or check **None of the above**.

You, the parents, filed as Married Filing Separately

You, the parents, filed as Head of Household

You, the parents, filed an amended tax return

You, the parents, filed a Puerto Rican or foreign tax return

You, the parents, recently filed taxes

None of the above

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA.

Enter your PIN and click **Link To IRS**.

Which parent are you?
Select

What is your PIN?
[Apply For A PIN](#)
[I Forgot/Don't Know My PIN](#)
LINK TO IRS

PREVIOUS NEXT

Help and Hints

None of the above

Under certain conditions, parents are not eligible to use the IRS Data Retrieval Tool, which allows users to link to the IRS Web site and securely transfer IRS tax return information into their FAFSA. If you meet any of these conditions, you will not be presented with the option to link to the IRS.

- If eligible to use the tool, you will be transferred to the IRS Website. You will then be notified you that you are leaving the FAFSA website and entering the IRS website to complete the transfer of your tax information. Click ok.



- 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.

Internal Revenue Service
United States Department of the Treasury

Log Out | Help

003 Web Page - Input Shared Secrets

Get My Federal Income Tax Information

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

Enter the following information as it appears on your Federal Income Tax Return. Required fields *

First Name *	Joe
Last Name *	Smith
Social Security Number *	***-**-6789
Date of Birth *	01 / 04 / 1990
Address *	
P.O. Box and/or Street Address	
Apt. Number (Required if it appears on your tax return)	
Country *	United States
City, Town or Post Office *	
State/U.S. Territory *	Select One
ZIP Code *	
Filing Status *	Select One

Submit

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).

IRS.gov

Return to FAFSA | Log Out | Help

Parent <YYYY> 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		
Name (s)	<Joe & Jane>	
Social Security Number	<***-**-6789>	
Filing Status	<Married-Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question <#> on the FAFSA
Adjusted Gross Income	<\$126,721>	Question <#> on the FAFSA
Income Tax	<\$31,400>	Question <#> on the FAFSA
IRS Exemptions	<5>	Question <#> on the FAFSA
Education Credits	<\$2,500>	Question <#> on the FAFSA
IRA Deductions and Payments	<\$2,500>	Question <#> on the FAFSA
Tax-Exempt Interest Income	<\$2,500>	Question <#> on the FAFSA
Untaxed IRA Distributions	<-\$2,500>	Question <#> on the FAFSA
Untaxed Pensions	<-\$2,500>	Question <#> 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

After you have transferred your data, you will be returned to the FAFSA website to finish your application. Make sure not to 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."

Sign & Submit

Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a preparer?
 Yes No

How do you (the student) want to provide your signature?
 Sign Electronically With My PIN (Fastest) [Apply For A PIN](#)
 Print A Signature Page
 Submit Without Signatures

READ BEFORE PROCEEDING

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan and
5. will not receive a Federal Pell Grant from more than one school for the same period of time.

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](#)

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**.