

Instructions for using the IRS Data Retrieval tool

Follow these steps if you did not originally request IRS Data Retrieval transfer to your FAFSA.

1. Log into your FAFSA (www.FAFSA.gov) and click on “Start Here” (If already completed and making corrections click on “Make Corrections to a Processed FAFSA” after you sign in)



2. Enter all required information. The IRS Data Retrieval tool will appear at the “Financial Information” section of the FAFSA.

The screenshot shows the FAFSA application progress bar. The "Financial Information" section is highlighted in yellow. A blue arrow points from the "Financial Information" text in the step above to this section. The progress bar includes the following sections: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. Below the progress bar, the "Student Demographic Information" section is visible, with input fields for "Your last name" (Eagle), "Your first name" (Ernie), and "Your middle initial". A "Help and Hints" section is also visible on the right, titled "Student's Last Name Question 1".

3. You will be prompted to answer “For 2011, have your parents completed their IRS income tax return or another tax return?” There is a drop down box that will allow you to pick one of three options: will file, not going to file and already completed.

Select “Already completed”, this will prompt the following questions:

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, displaying the "Parent Tax Information" form. The form asks, "For 2011, have your parents completed their IRS income tax return or another tax return?" and has a dropdown menu with "Already completed" selected. Below this, there is a section titled "You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS." with a sub-instruction: "Check all that apply or check None of the above." There are five checkboxes: "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", and "You, the parents, recently filed taxes". The "None of the above" checkbox is checked. To the right of the form is a "Help and Hints" section titled "Parents Filed 2011 Income Tax Return? Question 79". It explains that the question asks whether or not the parents have filed or will file a 2011 income tax return and provides instructions on how to answer based on marital status. At the bottom of the help section, it says "Select the option that indicates your parents'".

If you select one of the following responses:

- as Married Filing Separately
- as Head of Household
- an amended tax return
- a Puerto Rican or foreign tax return

You will get a response of “Based on your response, you are not eligible to transfer your information from the IRS into this FAFSA.”

If you select:

- You, the parents, recently filed taxes

You will get a response of “If you filed your taxes electronically within the last 2 weeks or if you filed your taxes by mail within the last 8 weeks, your tax information may not be available yet from the IRS. You can determine if you should attempt to access your tax information from the IRS at this time.”

If you select:

- None of the above

You will get a response of “Based on your response, we recommend that you transfer your information from the IRS into this FAFSA.”

You will then be prompted to select a parent and enter their respective PIN number. Then click [LINK TO IRS](#).

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](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Select the option that indicates your parents' 2011 income tax return filing status:

Your FAFSA will then be saved and a site exit message will display:

The page at <https://fafsaed.gov> says:

 You are now leaving FAFSA on the Web and will be linked to the IRS Web site to view your IRS tax information.
If you click 'OK' your FAFSA will be saved and your current session will end.

Your saved FAFSA will automatically open when you transfer your information from the IRS. If you do not transfer your information from the IRS, you will have to login to open your saved FAFSA.

Click 'OK' to continue. Otherwise, click 'Cancel.'

If you have questions or problems using this tool, contact Federal Student Aid's [Customer Service](#).

[Cancel](#) [OK](#)

4. On the IRS web site enter all requested information.

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 <2008> Federal Income Tax Return. [?](#)

Required fields *

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

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.

Once the IRS validates your identification your IRS tax information will display. You will then be given the option to transfer your information or return to the FAFSA where you will be asked to manually enter your information. **If your FAFSA is chosen for verification and you or your parent chooses not to use the IRS data retrieval process or did retrieve IRS data and subsequently manually change it you must provide your [IRS Tax Return Transcript](#) obtained directly from the IRS. Schools can no longer accept photocopied Federal tax returns.**

- After clicking **Transfer Now** you will get a response that reads “You have successfully transferred your 2011 tax information.”

The data that will be retrieved, if applicable, includes:

- Adjusted gross income
- Taxes paid
- Number of exemptions
- Education credits
- Untaxed portion of IRA distributions and pensions

The following information will not be retrieved and must be manually added to the FAFSA if applicable:

- Earned income (Box 1 on W-2 statements)
- Self-employment income (Line 12 or 18 of your Tax Return. If negative, enter zero)
- Earned income from partnership (Form 1065: Box 14, Code A of Schedule K-1)
- Payments to tax-deferred pensions (Box 12a – 12d codes D, E, F, G, H and S)
- Child support received or paid

- You are NOT DONE!! Be sure to complete the sign and submit section and electronically sign with your PIN numbers. You are not finished until you have received a confirmation number and Expected Family Contribution (EFC) number. To complete verification you must also submit a signed copy of the verification worksheet.