

## FAFSA – IRS Data Retrieval Tool

For the 2021-2022 award year, students/parents who indicate they have filed a 2019 Federal Income Tax Return will be directed to use the IRS Data Retrieval Tool to report or update their income information on the FAFSA.

- The IRS Retrieval Tool gives students/parents the ability to transfer their income information directly from the IRS onto the FAFSA.
- When you answer that you have Already Completed your 2019 IRS income tax return, you may be eligible to transfer your tax data onto the FAFSA using the IRS Retrieval Tool. You must also know your tax filing status to use the IRS Retrieval Tool.

- 1) Click “Link to IRS” and there will be a message informing you that you are leaving FAFSA on the Web and being directed to the IRS website.

(Note: If your tax filing status was “Married-Filed Separate Return”, or you filed a Puerto Rican or foreign tax return for 2019, the IRS Retrieval Tool will not be available for your use.)

The screenshot shows the FAFSA IRS Data Retrieval Tool interface. It consists of three dropdown menus for selecting tax return information for 2019. The first menu is 'For 2019, have you completed your IRS income tax return or another tax return?' with 'Already completed' selected. The second menu is 'What income tax return did you file for 2019?' with 'IRS 1040' selected. The third menu is 'For 2019, what is your tax filing status according to your tax return?' with 'Married-Filed Joint Return' selected. Below these menus is a dark blue header for the 'IRS Data Retrieval Tool'. Under the header, a message states: 'Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!'. At the bottom, there is a blue button labeled 'LINK TO IRS' with a double-headed arrow icon, and a large black arrow pointing left towards the button.

For 2019, have you completed your IRS income tax return or another tax return? ?


Already completed ▼

What income tax return did you file for 2019? ?


IRS 1040 ▼

For 2019, what is your tax filing status according to your tax return? ?

Married-Filed Joint Return ▼

 **IRS Data Retrieval Tool**

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

[LINK TO IRS !\[\]\(840d6c115e0cb8b06948cdaae91bd8ec\_img.jpg\)](#) 

- 2) Click "Proceed to IRS Site" and "Ok"

## 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.**

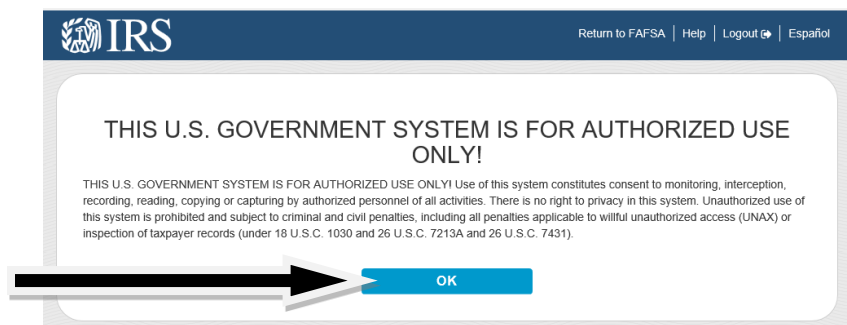
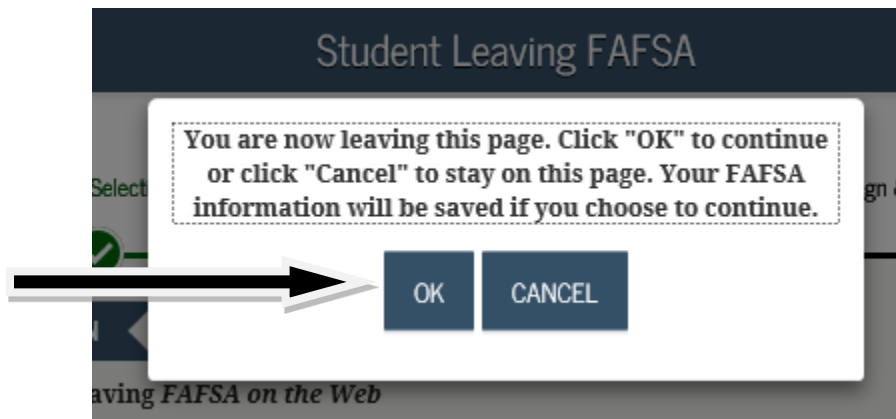
SKIP IRS DRT

PROCEED TO IRS SITE


Site Last Updated: Sunday, October 28, 2018

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- 3) Once you are connected to IRS.gov:
  - a. Enter your address exactly how it looks on your 2019 Federal Income Tax Return
  - b. Click "Submit"

Return to FAFSA | Help | Logout | Español

### Get My Federal Income Tax Information

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

Enter the following information from your 2018 Federal Income Tax Return. ?

All fields are required unless marked otherwise.

**First Name**


**Last Name**

**Social Security Number**

No input required

**Date of Birth**

MM/DD/YYYY



**Filing Status** ?

Married-Filed Joint Return

**Street Address** ?

Must match your Federal Income Tax Return

**P.O. Box** ?

Required if entered on your tax return

**Apartment Number**

Required if entered on your tax return

**Country**

United States

**City, Town or Post Office**

**State / U.S. Territory**

Select One

**ZIP Code**

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.

**SUBMIT**

Select the button below to exit the IRS system and return to your FAFSA.

**CANCEL**

- 4) You will be provided a list of all the possible fields from a tax return that could transfer back into the FAFSA form. **(Your tax information will be masked for your security)**
- Select [Transfer My Tax Information into the FAFSA Form](#)
  - Select [Transfer Now](#)

## 2019 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 Portion of IRA Distributions & Pensions/Annuities
Name(s)	Adjusted Gross Income	Tax-exempt Interest Income
Social Security Number	Income Earned from Work	IRA Deductions and Payments
Filing Status	Income Tax	Status of Amended Returns Received
IRS Exemptions	Education Credits	Schedule 1 Evaluation

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

### 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.



TRANSFER NOW ?

### 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.



DO NOT TRANSFER ?

- 5) Once you have transferred your data, you will be returned to the FAFSA website to complete the remaining questions on the FAFSA.

### Student IRS Info

Student Demographics

School Selection

Dependency Status

Parent Demographics

Parent Financials

Student Financials

Sign & Submit

Confirmation

STUDENT INFORMATION

You have successfully transferred your 2019 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." For your protection, IRS tax return information is not displayed on the FAFSA.

What was your (and your spouse's) adjusted gross income for 2019?  
Transferred from the IRS

PREVIOUS

NEXT

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