

# FAFSA – IRS Data Retrieval Tool

For the 2022-2023 award year, students/parents who indicate they have filed a 2020 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 2020 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 “Continue” 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 2020, the IRS Retrieval Tool will not be available for your use.)

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ Parent Financials ✓ Student Financials 6 Sign & Submit 7

STUDENT INFORMATION

### Student Tax Filing Status

✓ Application was successfully saved.

1 Because the FAFSA® form belongs to the student, “you” and “your” always (unless otherwise noted) refer to the student.

For 2020, have you completed your IRS income tax return or another tax return?  
Already completed

What income tax return did you file for 2020?  
IRS Form 1040

For 2020, what is your tax filing status according to your tax return?  
Married-filed joint return

RECOMMENDED  
**IRS Data Retrieval Tool**

Based on your responses, you are not eligible to transfer your information from the IRS into this FAFSA® form.  
Select “Continue.”

Previous Continue

2) Click "Proceed to the IRS" and "Ok"

The screenshot shows the FAFSA application progress bar at the top with steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Parent Financials, Student Financials (6), and Sign & Submit (7). The main heading is "STUDENT INFORMATION" followed by "Student Leaving Your FAFSA® Form". The text explains that the FAFSA form will be deleted and replaced with tax return information, and that the form will be transferred to the IRS website. At the bottom, there are two buttons: "Skip IRS DRT and Complete Manually" and "Proceed to the IRS". The "Proceed to the IRS" button is circled in red, and a large black arrow points to it from the right.

The screenshot shows the IRS website header with the IRS logo and navigation links: "Return to FAFSA", "Help", "Logout", and "Español". The main heading is "THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!". Below this is a warning message: "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 (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).". At the bottom, there is a blue "OK" button circled in red, with a large black arrow pointing to it from the left.

- 3) Once you are connected to IRS.gov:
  - a. Enter your address exactly how it looks on your 2020 Federal Income Tax Return
  - b. Click "Submit"

The image shows a screenshot of the IRS 'Get My Federal' form. The main form is partially visible in the background, showing fields for First Name, Last Name, Social Security Number, Date of Birth, Filing Status, Street Address, and P.O. Box. A zoomed-in view of the address section is overlaid in the foreground. This zoomed view includes fields for Apartment Number, Country (United States), City, Town or Post Office (Coralville), State / U.S. Territory (Iowa), and ZIP Code (52317). A blue 'SUBMIT' button is circled in red, and a 'CANCEL' button is visible below it. A disclaimer at the bottom of the zoomed view states: 'By submitting this information, you certify that you are the person who filed the return and that the information is correct. False information may result in civil and criminal penalties.'

- 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)**
  - a. Select Transfer My Tax Information into the FAFSA Form
  - b. Select Transfer Now

IRS

Return to FAFSA | Help | Logout | Español

### 2020 Federal Income Tax Information

Get Data

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** ?

IRS Privacy Policy | Accessibility

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

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ Parent Financials ✓ **6 Student Financials** 7 Sign & Submit

### STUDENT INFORMATION

#### Student IRS Info

**✓ You have successfully transferred your 2020 IRS tax information.**

Your IRS tax information has been successfully transferred into this FAFSA® form. 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 form.

What was your adjusted gross income for 2020?

Transferred from the IRS ?

Previous **Continue**