FAFSA – IRS Data Retrieval Tool

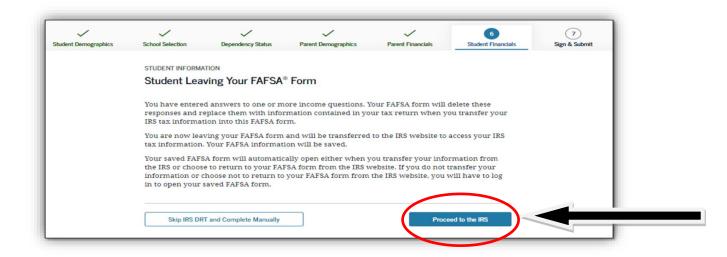
For the 2022-2023 award year, students/parents who indicate they <u>have filed</u> a 2020 Federal Income Tax Return will be directed to use the IRS Data Retrieval Tool to report or update their income information on the FAFSA.

- 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 <u>Already Completed</u> 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 | 5 Student Financials | 7 Sign & Submit | | |
|----------------------|--|-------------------|---------------------|-------------------|-------------------------|--------------------|--|--|
| | STUDENT INFORMATION | | | | | | | |
| | Student Tax Filing Status | | | | | | | |
| | Applica | | | | | | | |
| | Because the FAFSA ⁸ 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 | | | | | | | |
| | | | | | | | | |
| | Based on 1 | | | | | | | |
| | | | Select "Continue." | | | | | |
| | | | | | | | | |
| | Previous | | | | Continue | | | |
| | | | | | | | | |

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





- 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"

| Get | My Federal | | |
|--|---|--|--|
| | aur Privacy Notice regar | | |
| Enter the following information from yo | ur 2020 Federal Incom | | |
| All fields are required unless marked other | wise. | | |
| First Name | | | |
| First | | | |
| Last Name | | | |
| Last | | | |
| Social Security Number | | | |
| his input required | | | |
| *** - ** - 2617 | | | |
| Date of Birth | | | |
| 01/01/1000 | Apartment Number | | |
| | Required if entered on your tax return | | |
| Filing Status 🕐 | | | |
| Single | Country | | |
| Street Address 🅐 | | | |
| Must match your 2019 Federal income To 122 Onlydele Dr. | United States | | |
| 123 Oakdale Dr. | City, Town or Post Office | | |
| P.O. Box (9) Required if entered on your tax return | | | |
| | State / U.S. Territory | | |
| | lowa | | |
| | ZIP Code | | |
| | 52317 | | |
| | 52317 | | |
| | By submitting this information, you certify that you are the result in civil and criminal penalties. | | |
| | SUBMIT | | |

- 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 <u>Transfer Now</u>

| #IRS | | Return to FAFSA Help Logout 🍘 Españo |
|---|--|---|
| 2020 Federal Income Gdt Data Based on the information you provided, the Interm below, the IRS will securely transfer your tax infor questions. For your protection, the IRS will not display your tax in DRT, therefore, ED is unable to display your tax in The data retrieved from your tax return is limited to | al Revenue Service (IRS) located your in mation to the U.S. Department of Educat ax information and will further encrypt an formation on your FAFSA form. o the items listed below as you reported t | on (ED) to populate any applicable FAFSA® (tax information transferred using the IRS o the IRS: |
| Name(s) Adj Social Security Number Inco Filing Status Inco | e of Return Filed usted Gross Income ome Earned from Work ome Tax ucation Credits | Untaxed Portion of IRA Distributions & Pensions/Annultes Tax-exempt Interest Income IRA Deductions and Payments Status of Amended Returns Received Schedule 1 Evaluation |
| Transfer My Tax Information Time to Appendix and the sequence of Transfer My Tax Information into the FAFSA C appropriate FAFSA questions. After the FAFSA C your IRSE assiston will end, and you will return to this box if you are choosing to transfer your infor Do Not Transfer My Tax Information and Return By clicking the "Do Not Transfer" button, you are your tax information electronically Your IRS search | pulate the answers to the questions are populated, your FAPSA form. Check mation. | TRANSFER NOW (9) |
| return to your FAFSA form. | | |
| ØIRS | | IRS Privacy Policy (2* Accessibility (2 |

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 INFORM | ATION | | | | | | |
| | Student IRS Info | | | | | | | |
| | Vou h Your I Questi from t FAFSA | | | | | | | |
| | What was your adjusted gross income for 2020? Transferred from the IRS ③ | | | | | | | |
| | Previous | | | | Continue | | | |