

# FAFSA – IRS Data Retrieval Tool

For the 2023-2024 award year, students/parents who indicate they have filed a 2021 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 2021 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 2021, the IRS Retrieval Tool will not be available for your use.)

The screenshot shows the FAFSA application progress bar at the top with steps 1 through 7. Step 6, 'Student Financials', is currently active. Below the progress bar, the 'STUDENT INFORMATION' section is titled 'Student Tax Filing Status'. A green message box states 'Application was successfully saved.' Below this, a blue information box explains that 'you' and 'your' always refer to the student. The form contains three dropdown menus: 'For 2021, have you completed your IRS income tax return or another tax return?' (set to 'Already completed'), 'What income tax return did you file for 2021?' (set to 'IRS Form 1040'), and 'For 2021, what is your tax filing status according to your tax return?' (set to 'Single'). A large white box with a blue border recommends the 'IRS Data Retrieval Tool', stating that applying is faster and easier if tax return information is transferred into the FAFSA form. A small disclaimer below reads: 'For your protection, your tax return information will not display on the IRS website or on the FAFSA form.' At the bottom of the form, there are three buttons: 'Previous', '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 side of the image.

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

STUDENT INFORMATION

### Student Leaving Your FAFSA® Form

You have entered answers to one or more income questions. Your FAFSA form will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA form.

You are now leaving your FAFSA form and will be transferred to the IRS website to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA form will automatically open either when you transfer your information from the IRS or choose to return to your FAFSA form from the IRS website. If you do not transfer your information or choose not to return to your FAFSA form from the IRS website, you will have to log in to open your saved FAFSA form.

[Skip IRS DRT and Complete Manually](#) [Proceed to the IRS](#)

IRS

Return to FAFSA | Help | Logout | Español

## THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!

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).

[OK](#)

3) Once you are connected to IRS.gov:

- Enter your address exactly how it looks on your 2021 Federal Income Tax Return
- Click "Submit"

IRS

### Get My Federal Income

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

Enter the following information from your 2021 Federal Income Tax Return. All fields are required unless marked otherwise.

First Name  
DEPENDENT

Last Name  
DATA43

Social Security Number  
No input required  
--- -- 2542

Date of Birth  
MM/DD/YYYY  
01/01/1999

Filing Status  
Married-Filed Joint Return

Street Address  
Must match your 2021 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 result in civil and criminal penalties.

[SUBMIT](#) [CANCEL](#)

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

- 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

Return to FAFSA | Help | Logout | Español

## 2021 Federal Income Tax Information

Dependent Data<sup>43</sup>

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** ⓘ

**TRANSFER NOW** ⓘ

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.

**Do Not Transfer My Tax Information and Return to the FAFSA Form** ⓘ

**DO NOT TRANSFER** ⓘ

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.

- 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 | **Student Financials** | Sign & Submit

### STUDENT INFORMATION

#### Student IRS Info

**You have successfully transferred your 2021 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 2021?

Transferred from the IRS ⓘ

Previous | **Continue**