

IRS Data Retrieval Instructions

Step 1: Go to www.fafsa.gov and click “Login.”

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of
the AMERICAN MIND™

FAFSA™
Free Application for Federal Student Aid

Home

About Us

PIN Site

StudentAid.gov

Help

SEARCH

EnglishEspañol

Get help paying for college

Submit a Free Application for Federal Student Aid (FAFSA)



New to the FAFSA?

Start A New FAFSA

Returning User?

- Make a correction
- Add a school
- View your Student Aid Report (SAR), and more...

Login

Step 2: Enter your FSA Username and Password and click "Next."

Home

Help

SEARCH

Federal Student Aid

AN OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of
the AMERICAN MIND®

FAFSA®

Free Application for Federal Student Aid

STUDENT

Login

Student Information

Form Approved
OMB No. 1845-0001
App. Exp. 12/31/2016

Instructions are provided for each FAFSA question in the Help and Hints section on the right side of the page and are also available by clicking **Need Help?** at the bottom of the page.

Enter either your (the student's) FSA ID or personal information to log in to FAFSA on the Web.

☒ Enter your (the student's) FSA ID

☐ Enter the student's information

Do not log in with the FSA ID if you are not the student.
[Create an FSA ID](#)

FSA ID Username or Verified E-mail Address

[Forgot Username](#)

FSA ID Password

[Forgot Password](#)

OR

NEXT

Help and Hints

Login Options

The FSA ID, which consists of a user-created username and password, replaced the PIN effective May, 2015. It allows users to electronically access personal information on Federal Student Aid Web sites as well as electronically sign a FAFSA.

Select one:

Enter your FSA ID (only the student should log in with an FSA ID).

Or

Enter the student's name, Social Security Number and date of birth. (You may have to enter your FSA ID later in the process).

NEED HELP?

Step 3: Click “Make FAFSA Corrections.”

Home

Help

Welcome, Logout

SEARCH

Federal Student Aid

AN OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of the AMERICAN MIND®

FAFSA®

Free Application for Federal Student Aid

STUDENT

My FAFSA

Welcome, new user!

2016-2017

2015-2016

Current Application Status: Processed Successfully

Congratulations, your FAFSA was successfully processed.

What Happens Next

- Your FAFSA information was made available to the school(s) you listed on your FAFSA.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA.

Original Application

Submitted: 01/15/2016

Processed: 01/01/2015

FSA ID

Last Time, Date FSA ID Used:

FSA ID Status:

[Create an FSA ID](#)


There is no FSA ID on file for the information you entered.

Create a shareable file with some of your student information.


[Learn More](#)

NEED HELP?


Step 4: Create a Save Key and click “Next.”



PROUD SPONSOR of
the AMERICAN MIND®



Free Application for Federal Student Aid



Help

SEARCH

Student Demographics

School Selection

Dependency Status

Parent Demographics

Financial Information

Sign & Submit

Confirmation

STUDENT

Introduction Page - 2016-2017 FAFSA

Use the **Next** and **Previous** buttons to move from page to page in the form. If you use your browser's back and forward buttons to move from page to page, you may lose your data.

Additional information about *FAFSA* on the Web:

- [How can I get help completing my FAFSA?](#)
- [How many steps does it take to complete?](#)
- [How long will it take to complete?](#)
- [Can I save my FAFSA if I can't finish it?](#)
- [Documents needed to complete the FAFSA](#)
- [Signing the FAFSA](#)
- [FAFSA on the Web Security and Privacy](#)

NEXT

EXIT

Step 5: Click on the “Financial Information” tab. Select “Already Completed” for the tax return filing status and answer the eligibility questions.

Federal Student Aid
An Office of the U.S. Department of Education

PROUD SPONSOR of
the AMERICAN MIND®

Free Application for Federal Student Aid

FAFSA®

Help

SEARCH

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

STUDENT

Student Tax Information

Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?
Already completed

For 2015, what is your tax filing status according to your tax return?
Married-Filed Joint Return

To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):

Did you file a Form 1040X amended tax return?
Yes No

Did you file a Puerto Rican or foreign tax return?
Yes No

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
Yes No

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address [Forgot Username](#)
[Forgot Password](#)

FSA ID Password [LINK TO IRS](#)

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?

If you filed your taxes electronically within the last three weeks, or by mail within the last eleven weeks, select **Yes**; otherwise, select **No**.

If you filed your taxes within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#); however, if you are not able to transfer your tax return information into your FAFSA at this time, you can try again in a week or two or you can manually enter your tax return information.

Step 6: If you are eligible to use the IRS Data Retrieval Tool, you can now click on the LINK TO IRS button. If you are not eligible to use the IRS Data Retrieval Tool follow, [these instructions](#) to order a tax return transcript.

Step 7: Click “OK” to leave the FAFSA website and enter the IRS Data Retrieval website.

The screenshot shows the FAFSA website interface. At the top, it says "Federal Student Aid" and "FAFSA™ Free Application for Federal Student Aid". Below this is a navigation bar with tabs: "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Financial Information" tab is currently selected. The main content area displays a message titled "Leaving FAFSA on the Web". The message states: "You are now leaving FAFSA on the Web and will be transferred to the IRS Web site to access your IRS tax information. Your information will be saved and your FAFSA on the Web session will end." It continues: "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." It then says: "Click OK to continue. Otherwise, click Cancel." At the bottom of the message area, there are two buttons: "CANCEL" and "OK".

Step 8: Click “OK” to accept the IRS Data Retrieval Tool terms of use.

The screenshot shows a Windows dialog box titled "The page at https://sa2.www4.irs.gov says:". The dialog box contains the following text: "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 of the dialog box, there is an "OK" button.

Step 9: Enter the requested information and click “Submit.” Remember to enter your address exactly as it appeared when you filed your taxes.



[Return to FAFSA](#) | [Log Out](#) | [Help](#)

[Español](#)

Get My Federal Income Tax Information

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

Enter the following information from your 2015 Federal Income Tax Return. [?](#)

Required fields *

First Name *	<input type="text" value="Dependent"/>
Last Name *	<input type="text" value="Data"/>
Social Security Number *	<input type="text" value="*** - ** - 2581"/>
Date of Birth *	<input type="text" value="01 / 01 / 1994"/>
Filing Status * ?	<input type="text" value="Single"/>
Address - Must match your 2015 Federal Income Tax Return. ?	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered 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"/>

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

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.

[Return to FAFSA](#)

[Submit](#)

Step 10: Review the information that the IRS has retrieved from your tax returns. Check the box to “Transfer My Tax Information into the FAFSA” and click “Transfer Now.” Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.



Student 2015 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers ?
Tax Year	2015	
Name(s)	Dependent Data	
Social Security Number	*** - ** - 2581	
Filing Status	Single	Question 34 on the FAFSA
Type of Tax Return Filed	1040EZ	Question 33 on the FAFSA
Adjusted Gross Income	\$9,750	Question 36 on the FAFSA
Income Earned From Work ?	\$20,125	Question 39 on the FAFSA
Income Tax	\$7,025	Question 37 on the FAFSA
IRS Exemptions	5	Question 38 on the FAFSA

Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA ?

- ☒ The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

Transfer Now ?

Do Not Transfer My Tax Information and Return to the FAFSA ?

- ☐ 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. You may still use this tax information to input the data into your FAFSA.

Do Not Transfer ?

Step 11: Do not update any answers that say “Transferred from the IRS” or your school may require you to supply additional documentation. Answer the additional questions and click “Next.”

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of
the AMERICAN MIND®

FAFSA®
 Free Application for Federal Student Aid

[Help](#)

[SEARCH](#)

[Student Demographics](#)

[School Selection](#)

[Dependency Status](#)

[Parent Demographics](#)

[Financial Information](#)

[Sign & Submit](#)

[Confirmation](#)

STUDENT

Student Financial Information

☒

You have successfully transferred your 2015 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."

What income tax return did you file for 2015?

Transferred from the IRS

What was your adjusted gross income for 2015? This amount is found on IRS Form 1040A-line 21 or 1040EZ-line 4.

\$

Transferred from the IRS

Your income earned from working (wages, salaries, tips, etc.) in 2015 was **transferred from the IRS**. This amount is found on IRS Form 1040A-line 7 or 1040EZ-line 1.

\$

PREVIOUS

NEXT

NEED HELP?

SAVE

CLEAR ALL DATA

VIEW FAFSA SUMMARY

EXIT

Help and Hints

Student's Type of 2015 Tax Form Used
Question 33

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

If the answer to this question is not pre-filled, you must select the income tax return that you filed or will file for 2015:

- IRS 1040
- IRS 1040A or 1040EZ
- A foreign tax return
- A tax return for a U.S. territory or a Freely Associated State (including Puerto Rico,

NOTE: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financial Information Section and once under the Parent Financial Information section before submitting the FAFSA.

Step 12: Continue to the “Sign & Submit” tab. Follow all of the instructions carefully to submit your FAFSA correction.

Sign With an FSA ID

Parent Signature - Sign With an FSA ID

Mother's/Stepmother's Social Security Number

Mother's/Stepmother's last name

Mother's/Stepmother's date of birth

READ BEFORE PROCEEDING
By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked:

1. to provide information that will verify the accuracy of your completed form
2. to provide U.S. or state income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

I, the parent, agree to the terms outlined above.

☐ Agree ☒ Disagree

What is your (the Mother's/Stepmother's) FSA ID?

FSA ID Username or Verified E-mail Address

[Create an FSA ID](#)

FSA ID Password

[Forgot Username](#)
[Forgot Password](#)

Student Signature - Sign With an FSA ID

READ BEFORE PROCEEDING
By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same year.

I, the student, agree to the terms outlined above.

☐ Agree ☒ Disagree

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address

[Create an FSA ID](#)

FSA ID Password

Help and Hints

Terms of Agreement - Parent

In order to submit your FAFSA, your parent must review the Terms of Agreement and select Agree.

[More>>>](#)

Remember to print or save the confirmation page for your records.