

IRS Data Retrieval Tool for FAFSA

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

The screenshot shows the FAFSA homepage. At the top, there is a navigation bar with links for Home, About Us, PIN Site, StudentAid.gov, and Help. A search bar is located on the right. Below the navigation bar is a blue banner with the text "Get help paying for college" and "Submit a Free Application for Federal Student Aid (FAFSA)". Underneath the banner is a photo of four diverse students. Below the photo are two columns: "New to the FAFSA?" with a "Start A New FAFSA" button, and "Returning User?" with a list of options (Make a correction, Add a school, View your Student Aid Report (SAR), and more...) and a "Login" button.

Step 2: Enter your FSA Username and Password and click “Next”

The screenshot shows the FAFSA login page. On the left, there is a vertical "STUDENT" label. The main content area is titled "Login" and contains "Student Information" instructions. It offers two options: "Enter your (the student's) FSA ID" (selected) and "Enter the student's information". The "Enter your (the student's) FSA ID" option includes fields for "FSA ID Username or Verified E-mail Address", "FSA ID Username", and "FSA ID Password", each with a "Forgot" link. A "NEXT" button is at the bottom right. On the right side, there is a "Help and Hints" section with "Login Options" explaining the FSA ID process.

Step 3: Click "Make FAFSA Corrections."

The screenshot shows the 'My FAFSA' page for a user named Susan. The page header includes the Federal Student Aid logo, the text 'PROUD SPONSOR of the AMERICAN MIND', and the FAFSA logo with 'Free Application for Federal Student Aid'. Navigation links for Home, Help, and a Search bar are present. The main content area is titled 'My FAFSA' and 'Welcome, Susan'. It features two tabs for the years 2015-2016 and 2014-2015. The 2015-2016 tab is active, displaying a 'Current Application Status: Processed Successfully' message. Below this, a 'What Happens Next' section lists instructions for schools and the student. To the right, a table shows the 'Original Application' and 'Latest Correction' details. At the bottom, there is an 'FSA ID' section with a status link and a 'NEED HELP?' button.

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Free Application for Federal Student Aid

Home Help Welcome, Susan Logout SEARCH

My FAFSA

Welcome,

2015-2016 2014-2015

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).

Original Application
Submitted: 01/01/2015
Processed: 01/01/2015

Latest Correction
Submitted: 01/01/2015
Submitted By: Student
Processed: 01/01/2015

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
- [View Correction History](#) to view corrections made to your FAFSA

FSA ID Last Time, Date FSA ID Used: 5/18, 06/27/2015

FSA ID Status:
[Use Account Management](#)
You can use your FSA ID to sign your FAFSA electronically or make corrections to your FAFSA.

Create a shareable file with some of your student information.
[Learn More](#)

NEED HELP?

Step 4: Create a Save Key and click "Next."

The screenshot shows the 'Make Corrections to Your 2015-2016 FAFSA' page. The header is identical to the previous screenshot. The main content area is titled 'Make Corrections to Your 2015-2016 FAFSA'. It includes a 'Form Approved' stamp and instructions for creating a 'Save Key'. There are two input fields for the 'Create a Save Key' and 'Re-enter Save Key' steps. A 'NEXT' button is visible at the bottom of the form area. To the right, a 'Help and Hints' section provides details about the save key requirements. At the bottom, there is a 'NEED HELP?' button and a 'MY FAFSA' link.

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Home Help SEARCH

Make Corrections to Your 2015-2016 FAFSA

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

Create a Save Key.
The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

Create a Save Key

Re-enter Save Key

NEXT

NEED HELP? MY FAFSA

Help and Hints

Create a Save Key

Enter the save key you created when you started this application or correction.

The save key is between 4 and 8 characters long. It can contain any combination of numbers and / or uppercase and lowercase letters. For example, the save key "Student2" is different than the save key "sTuDeNt2."

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

The screenshot shows the FAFSA website's "Financial Information" section. The navigation tabs at the top are: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information (selected), Sign & Submit, and Confirmation. The main content area is titled "Student Tax Information" and contains the following elements:

- A success message: "Application was successfully saved."
- Question: "For 2014, have you completed your IRS income tax return or another tax return?" with a dropdown menu set to "Already completed".
- Question: "For 2014, what is your tax filing status according to your tax return?" with a dropdown menu set to "Single".
- A notification: "You may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS." with a "LINK TO IRS" button.
- Three eligibility questions with radio button options:
 - "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)
- A note: "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." with a "LINK TO IRS" button.
- Navigation buttons: "PREVIOUS" and "NEXT".
- Footer buttons: "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT".

A "Help and Hints" sidebar on the right provides additional instructions on filing taxes electronically and using the IRS Data Retrieval Tool.

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 you must request a tax return transcript from <https://www.irs.gov/Individuals/Get-Transcript>

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

The screenshot shows a dialog box titled "Leaving FAFSA on the Web". The text inside the dialog box reads:

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.

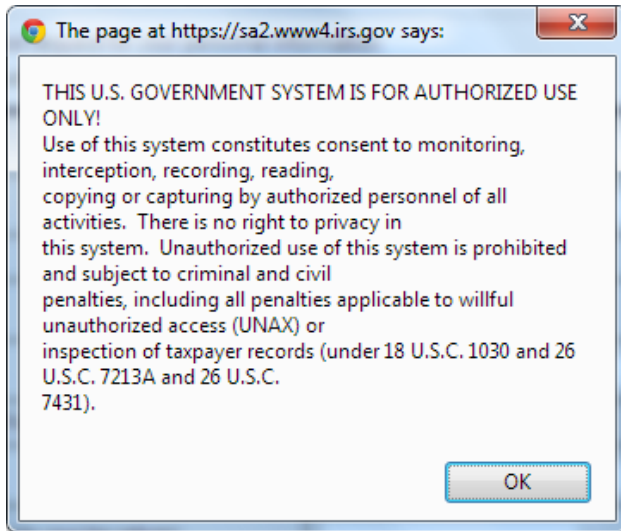
Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to FAFSA on the Web from the IRS Web site. If you do not transfer your information or choose not to return to FAFSA on the Web from the IRS Web site, you will have to log in to open your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

Click OK to continue. Otherwise, click Cancel.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

At the bottom of the dialog box are two buttons: "CANCEL" and "OK".

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



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

Get My Federal Income Tax Information

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

Enter the following information from your 2014 Federal Income Tax Return. Required fields *

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Social Security Number *	***-**-****
Date of Birth *	/ /
Filing Status *	Select One
Address - Must match your 2014 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 *	United States
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	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 2014 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:	2014	
Name(s)		
Social Security Number	***-**-****	
Filing Status		Question 34 on the FAFSA
Type of Tax Return Filed		Question 33 on the FAFSA
Adjusted Gross Income		Question 36 on the FAFSA
Income Earned From Work		Question 39 on the FAFSA
Income Tax		Question 37 on the FAFSA
IRS Exemptions		Question 38 on the FAFSA
Education Credits		Question 44a on the FAFSA
IRA Deductions and Payments		Question 45b on the FAFSA
Tax-Exempt Interest Income		Question 45d on the FAFSA
Untaxed IRA Distributions		Question 45e on the FAFSA
Untaxed Pensions		Question 45f 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 documentations. Answer the additional questions and click "Next."

The screenshot shows the FAFSA application interface. At the top, it says "Federal Student Aid" and "FAFSA Free Application for Federal Student Aid". The navigation tabs include Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The "Financial Information" tab is active.

Student Financial Information

Help and Hints

Student's 2014 Income Earned from Work
Question 39

If you are not married and use the IRS Data Retrieval Tool, the answer to this question will be pre-filled.

If you are married and use the IRS Data Retrieval Tool, your and your spouse's total income earned from working is transferred from the IRS. You are required to enter your portion of the transferred amount.

If you filed a 1040 tax return and use the IRS Data Retrieval Tool, tax information from IRS Schedule K-1 (Form 1065) is not transferred from the IRS. You are required to enter...

Success Message: You have successfully transferred your 2014 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 2014?

What was your adjusted gross income for 2014? This amount is found on IRS Form 1040-line 37.
 Transferred from the IRS

Your income earned from working (wages, salaries, tips, etc.) in 2014 was transferred from the IRS. This amount is the total of IRS Form 1040-lines 7+12+18.

Did you file an IRS Schedule K-1 (Form 1065) for 2014?
 Yes No

As of today, are you a dislocated worker?

Navigation buttons: PREVIOUS, NEXT, NEED HELP?, SAVE, CLEAR ALL DATA, VIEW FAFSA SUMMARY, EXIT

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.

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Help SEARCH

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

Sign & Submit

Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a preparer?
 Yes No

Student Signature

Student's Social Security Number

Student's last name

Student'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 or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

- will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
- are not in default on a federal student loan or have made satisfactory arrangements to repay it,
- do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
- will notify your school if you default on a federal student loan, and
- 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

[SIGN](#)

[PREVIOUS](#) [SUBMIT MY FAFSA NOW](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Help and Hints

Are you a preparer?

A preparer is anyone who charges a fee for helping you fill out your FAFSA.

Typically high school counselors, school financial aid administrators, or other mentors do not charge a fee to help you complete your application, so they are not considered preparers unless you paid them for their services.

If you are a preparer, select **Yes**.

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