

IRS Data Retrieval Instructions

1. Log on to your FAFSA application at www.fafsa.ed.gov.
2. When you get to the Financial Information tab, answer “Already Completed” if you have filed your taxes for the previous calendar year.
3. The FAFSA will list several tax-filing scenarios that might prevent you from using the IRS Data Retrieval. If you filed your taxes “recently” (fewer than 2 weeks ago), you may need to wait until the IRS Data Retrieval is available to you. Also, if you owe the IRS any payment of taxes, the IRS Data Retrieval will not be available to you until a few weeks after your payment has been received by the IRS.

The screenshot shows the 'Student Tax Information' section of the FAFSA application. At the top, there are navigation tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, and Financial Information. The 'Student Tax Information' tab is active. A blue vertical bar on the left contains the word 'STUDENT' vertically. A green box at the top of the form contains a checkmark icon and the text 'Application was successfully saved.' Below this, a question asks 'For 2012, have you completed your IRS income tax return or another tax return?' with a dropdown menu set to 'Already completed'. A blue box with a grid icon contains the text: 'You may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.' Below this are three questions with radio button options: 'Did you file an amended tax return?' (Yes/No), 'Did you file a Puerto Rican or foreign tax return?' (Yes/No), and 'Did you file your taxes electronically in the last 3 weeks (or by mail in the last 8 weeks)?' (Yes/No). A white box contains the text: 'Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. Enter your PIN and click [Link To IRS](#). What is your PIN? [input field] [I Forgot/Don't Know My PIN](#) [LINK TO IRS button]'. At the bottom of the form are 'PREVIOUS' and 'NEXT' buttons. A dark blue footer bar contains buttons for 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'.

STUDENT

Student Demographics School Selection Dependency Status Parent Demographics Financial Information

Student Tax Information

Application was successfully saved.

For 2012, have you completed your IRS income tax return or another tax return?
Already completed ▾

You may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Did you file an 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 8 weeks)?
 Yes No

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA.
Enter your PIN and click [Link To IRS](#).
What is your PIN?
 [I Forgot/Don't Know My PIN](#)
[LINK TO IRS](#)

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

If you can answer “No” to all questions listed in this section, you should be able to complete the IRS Data Retrieval. Enter your FAFSA pin number. You will be alerted that you are temporarily leaving the FAFSA on the Web. Click “OK.”

4. Once you are redirected to the IRS web site, you will get another warning notification reminding you that this is an official government web site not to be used for unethical purposes. Click “OK” again.

5. Enter your filing status and address information. **NOTE:** The Data Retrieval tool is not the smartest program in the world when it comes to recognizing address abbreviations, so be very careful to type your address *exactly* as it appears on your IRS 1040 tax form! For instance, if the address on the tax return read “101 N. Walnut St.” but you typed “101 N. Walnut *Street*” or “101 *North* Walnut St.” into this website, the search tool may not pick it up. Three incorrect tries will return you to the Financial Tab of the FAFSA, but you may log in and try again as many times as you wish.

6. Once the Data Retrieval’s search function has located your IRS account, it will show you a confirmation screen. Check the box that says “Transfer My Information” and then click “Transfer Now.” This will return you to the FAFSA application, but with relevant blanks filled in for you by the IRS web site.

The screenshot shows the 'Student Financial Information continued' page. On the left, a vertical blue bar contains the word 'STUDENT'. The main content area has a blue header. Below the header, there are three input fields. The first is for 'Enter the amount of your income tax for 2012', with a value of '\$ [redacted] .00' and a red oval around the text 'Transferred from the IRS'. The second is for 'Enter your exemptions for 2012', with a value of '1' and a red oval around the text 'Transferred from the IRS'. To the right of these fields is a red-bordered box containing the text 'Successfully transferred from IRS. DO NOT CHANGE!'. Red arrows point from this box to the two red ovals. Below these fields is a question: 'Did you have any of the following items in 2012? Check all that apply and provide amounts.' Underneath is a section titled 'Additional Financial Information' with a checked box for 'American Opportunity, Hope or Lifetime Learning tax credits'. Below that is a field for 'Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040A-line 31' with a value of '\$0 .00' and the text 'Transferred from the IRS'.

7. Continue to complete any blank fields on your FAFSA, but **DO NOT** change any value that was “Transferred from the IRS.” If you change any field with that label, it will remove the “official” nature of the data transfer and may result in you having to turn in a paper tax return transcript later on. Continue to the last page, where you (and a parent) will sign and submit your FAFSA application using your pin number(s).

Congratulations, you successfully used the IRS Data Retrieval Tool!