How to Transfer Your 2018 IRS Tax Information Directly into Your FAFSA

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. If for any reason the Data Retrieval Tool is unavailable, you can manually enter your tax information into your FAFSA.

- ➢ To use the Data Retrieval Tool, complete the following steps:
- ➢ Go to **fafsa.ed.gov** and select the "Start Here" button
- ➢ Log in using your FSA ID
- ➢ Select the "Continue" or "Make a Correction" button
- ➢ Select the "Financial Information" tab from the top of the page.

Instructions for the parent to request the parent IRS information:

1. Go to "Parent Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, select which parent is providing information on the FAFSA
4. Enter the FSA ID for the parent providing the information
5. Click "Link to IRS" (for an example of screen shots from the IRS DRT, see student section below)
6. You will be prompted to answer "For 2018, have your parents (if dependent) completed their IRS income tax return or another tax return?" In order to use the IRS Data Retrieval Tool select *"Already completed and your tax return filing status(i.e., single, married filing joint, head of household) according to your 2018 tax return."*
7. For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on fafsa.gov, the IRS DRT web page, and on the Student Aid Report.
8. If you only need to update the parent tax information, then proceed to the Sign and Submit page.

Instructions for the student to request the student IRS information:

1. Go to "Student Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, click "Link to IRS" You will be prompted to answer "For 2018, have you (student) completed your IRS income tax return or another tax return?" In order to use the IRS Data Retrieval Tool select *"Already completed and your tax return filing status (i.e., single, married filing joint, head of household) according to your 2018 tax return."*

IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

LINK TO IRS ⇄

● PREVIOUS   NEXT ●

Click "Next."

Parent Leaving FAFSA

Student Demographics — School Selection — Dependency Status — Parent Demographics — Parent Financials — Student Financials — Sign & Submit — Confirmation

PARENT INFORMATION

Leaving *FAFSA on the Web*

You, the parent, are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site. Your FAFSA information will be saved.

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.

For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.

SKIP IRS DRT ▤   PROCEED TO IRS SITE ●

Site Last Updated: Sunday, September 29, 2019   Download Adobe Reader

©2010 fafsa.gov. All rights reserved.

Click "Proceed To IRS Site."

Click "OK."

Click "OK."

Enter all requested information. Please make sure you enter your 2018 filing status as shown on your tax return and when completing this section make sure that all information entered exactly matches the information recorded on your 2018 tax return. This process is case sensitive then click "Submit."

You will then be given the option to transfer your 2018 tax information to the FASFA. Check the box to "Transfer My Tax Information" and click "Transfer Now." Also, if dependent and student filed a 2018 tax return, student will need to link his/her income information by using the Data Retrieval Tool.

For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on fafsa.gov, the IRS DRT web page, and on the Student Aid Report.

Click "Next" and you will return to the FAFSA website. You are NOT DONE YET!!!

Now proceed to the Sign and Submit page.

Signature Status

Student Demographics — School Selection — Dependency Status — Parent Demographics — Parent Financials — Student Financials — Sign & Submit — Confirmation

ⓘ Both you and a parent need to sign your FAFSA.

Only sign for yourself. If you and your parent are not together, one of you can sign, save the application and then exit. Give the "save key" to the other person who can log in with it and sign and submit the FAFSA.

Be sure not to mix up your and your parent's FSA IDs when signing.

Student Signature Needed

Signature Status: **Unsigned**

PROVIDE STUDENT SIGNATURE ✎

Parent Signature Needed

Signature Status: **Unsigned**

PROVIDE PARENT SIGNATURE ✎

◉ PREVIOUS

Site Last Updated: Sunday, September 29, 2019   Download Adobe Reader

©2010 fafsa.gov. All rights reserved.