

## **How to Transfer Your 2020 IRS Tax Information Directly to 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 on how the parent can use the IRS Data Retrieval Tool (DRT)**

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 2020, have your parents (if dependent) completed their IRS income tax return or another tax return?” 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 2020 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 on how the student can use the IRS Data Retrieval Tool (DRT)**

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 2020, have you (student) completed your IRS income tax return or another tax return?” 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.”***

**Below are examples of the screens you may see when using the IRS Data Retrieval Tool**

## 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)!

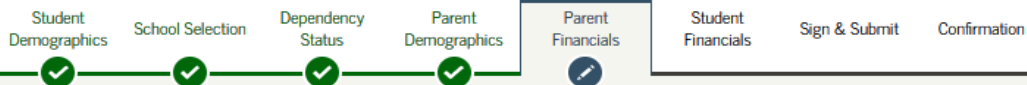
LINK TO IRS ↔

PREVIOUS

NEXT

Click “Next.”

## Parent Leaving FAFSA



### 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

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Click “Proceed to IRS Site.”

**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 on the Web.**

You are now leaving this page. Click "OK" to continue or click "Cancel" to stay on this page. Your FAFSA information will be saved if you choose to continue.

[PROCEED TO IRS SITE](#) 

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**Click "OK."**

An official website of the United States Government


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).


IRS Privacy Policy | Accessibility

**Click "OK."**

Enter all requested information. Please make sure you enter your 2020 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 2020 tax return. This process is case sensitive then click “Submit.”

You will then be given the option to transfer your 2020 tax information to the FAFSA. Check the box to “Transfer My Tax Information” and click “Transfer Now.” Also, if dependent and student filed a 2020 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 will not 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.

**Parent IRS Info**

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

**✓ You have successfully transferred 2018 IRS tax information.**

The parents' 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." For your protection, IRS tax return information is not displayed on the FAFSA.

What was your parents' adjusted gross income for 2018? ?  
**Transferred from the IRS**

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**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

**i 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

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**If for some reason you cannot use the IRS DRT, you will need to request a 2020 tax return transcript from the IRS.**