

How to Transfer Your 2021 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 2021, 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 2021 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 2021, 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.”***

Parent/student: Below are examples of the screens you will 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

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.

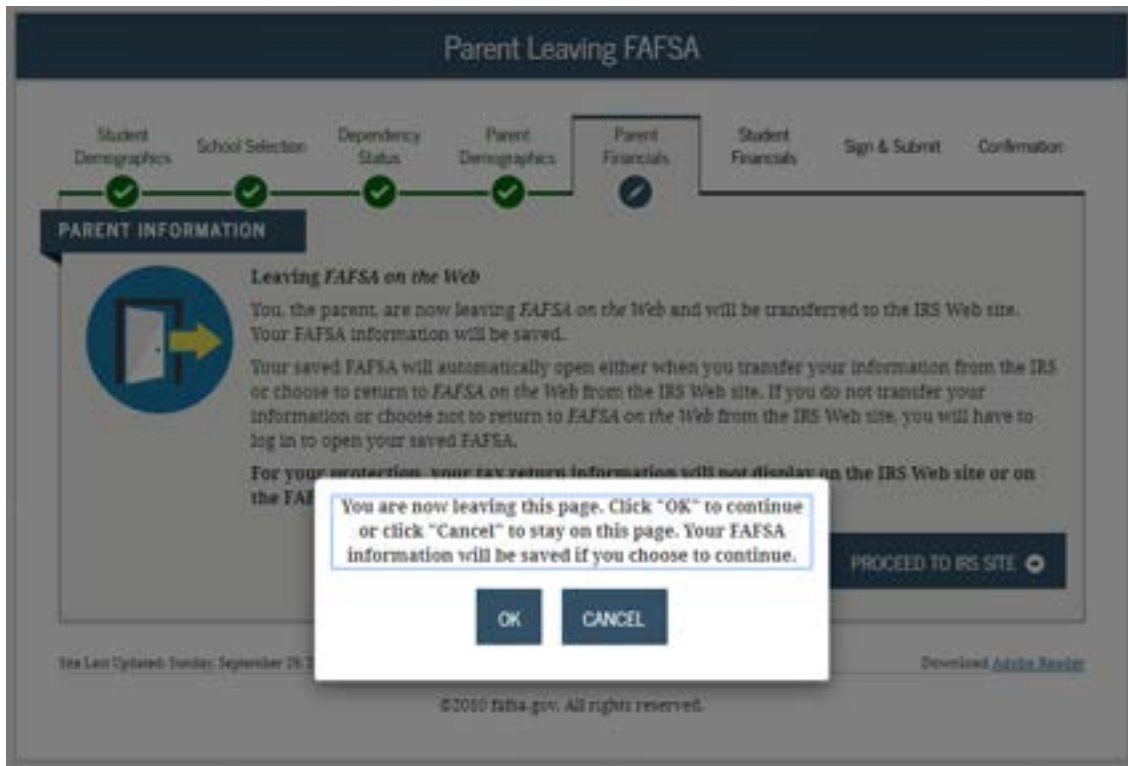
For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.

SKIP IRS DRT  PROCEED TO IRS SITE 

Site Last Updated: Sunday, September 29, 2009 [Download Adobe Reader](#)

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Click “Proceed to IRS Site.”



Click "OK."



Click "OK."

Enter all requested information. Please make sure you enter your 2021 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 2021 tax return. This process is case sensitive then click “Submit.”

Get My Federal Income Tax Information

Enter the following information from your 2020 Federal Income Tax Return.

First Name
First

Last Name
Last

Social Security Number
No input required
--2017

Date of Birth
MM/DD/YYYY
01/01/1999

Filing Status
Single

Street Address
Must match your 2019 Federal Income Tax Return
123 Oakdale Dr.

P.O. Box
Required if entered on your tax return

Apartment Number
Required if entered on your tax return

Country
United States

City, Town or Post Office
Coraville

State / U.S. Territory
Iowa

ZIP Code
52317

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.

SUBMIT

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

CANCEL

You will then be given the option to transfer your 2021 tax information to the FAFSA. Check the box to “Transfer My Tax Information” and click “Transfer Now.” Also, if dependent and student filed a 2021 tax return, student will need to link his/her income information by using the Data Retrieval Tool.

2021 Federal Income Tax Information

Dependent Data43

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT, therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS.

Tax Year	Type of Return Filed	Untaxed Portion of IRA Distributions & Pensions/Annuities
Name(s)	Adjusted Gross Income	Tax-exempt Interest Income
Social Security Number	Income Earned from Work	IRA Deductions and Payments
Filing Status	Income Tax	Status of Amended Returns Received
IRS Exemptions	Education Credits	Schedule 1 Evaluation

Refer to your tax records if you have a question about the values you reported.

Transfer My Tax Information into the FAFSA Form **TRANSFER NOW**

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.

Do Not Transfer My Tax Information and Return to the FAFSA Form **DO NOT TRANSFER**

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 form.

If parent and/or student tax information transferred successfully, you will receive the below message. For your privacy, the tax information you transferred 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.

The screenshot shows the FAFSA application progress bar at the top with steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Parent Financials, Student Financials (highlighted), and Sign & Submit. Below the progress bar, the page title is 'STUDENT INFORMATION' and 'Student IRS Info'. A green success message states: 'You have successfully transferred your 2021 IRS tax information. Your IRS tax information has been successfully transferred into this FAFSA® form. 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 form.' Below this is a text input field for 'What was your adjusted gross income for 2021?' with the value 'Transferred from the IRS'. At the bottom are 'Previous' and 'Continue' buttons.

Click “Next or Continue” and you will return to the FAFSA website. You are NOT DONE YET!!!

Now proceed to the Sign and Submit page.

The screenshot shows the 'Signature Status' page. The progress bar at the top includes: Student Demographics, School Selection, Dependency Status, Parent Demographics, Parent Financials, Student Financials, Sign & Submit (highlighted), and Confirmation. A blue information box contains the text: '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.' Below this are two columns: 'Student Signature Needed' and 'Parent Signature Needed', each with a 'Signature Status/Unsigned' indicator and a 'PROVIDE SIGNATURE' button. A 'PREVIOUS' button is at the bottom right. Footer text includes 'Site Last Updated: October 29, 2020' and '©2020 Delta.gov. All rights reserved.'

If for some reason you cannot use the IRS DRT, you will need to request a 2021 tax return transcript from the IRS.