How to Transfer Your IRS Tax Information Directly into Your FAFSA

You may have received an email from Federal Student Aid recommending that you use the IRS Data Retrieval Tool to transfer tax information directly from the IRS into your FAFSA. If for any reason the Data Retrieval Tool is unavailable, you can manually enter your tax information into your FAFSA.

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. To use the Data Retrieval Tool, complete the following steps:

- Go to https://studentaid.gov/h/apply-for-aid/fafsa
- 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. 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.
7. 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"
Get My Federal Income Tax Information

Enter the following information from your 2017 Federal Income Tax Return.

Required fields *

First Name *

Last Name *

Social Security Number *

Date of Birth *

Filing Status *


Street Address *

P.O. Box

(Required if entered on your tax return)

Apt Number

(Required if entered on your tax return)

Country *

City, Town or Post Office *

State / U.S. Territory *

ZIP Code *

Submit

2017 Federal Income Tax Information

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
- Name(s)
- Social Security Number
- Filing Status
- IRS Exemptions
- Income Tax
- Education Credits
- Adjusted Gross Income
- Income Earned from Work
- Untaxed Pensions
- Unaudited IRA Distributions
- Tax-exempt Interest Income
- IRA Deductions and Payments
- Status of Amended Returns Received

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

Transfer My Tax Information into the FAFSA Form

- 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

- 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.

Transfer Now

Do Not Transfer
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.

4. Proceed to the Sign and Submit page.

If you'd like to know more about the tool, FinAid offers a in depth summary on their website.