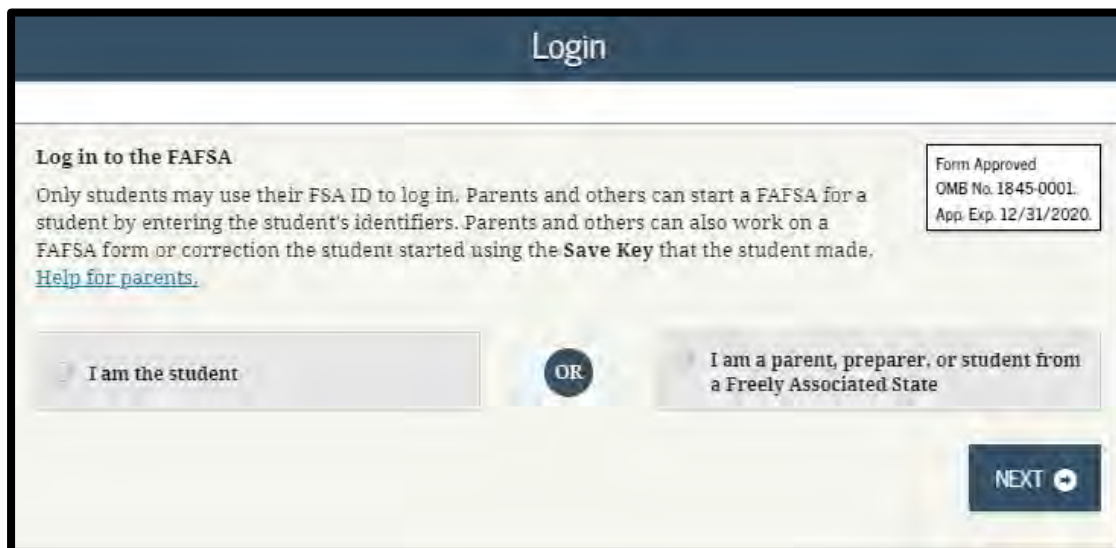


Using the Data Retrieval Tool

1. Create an FSA ID, if you do not already have one. To do so, go to www.fsaaid.ed.gov.
2. Navigate to www.fafsa.gov and select START HERE or LOG IN.



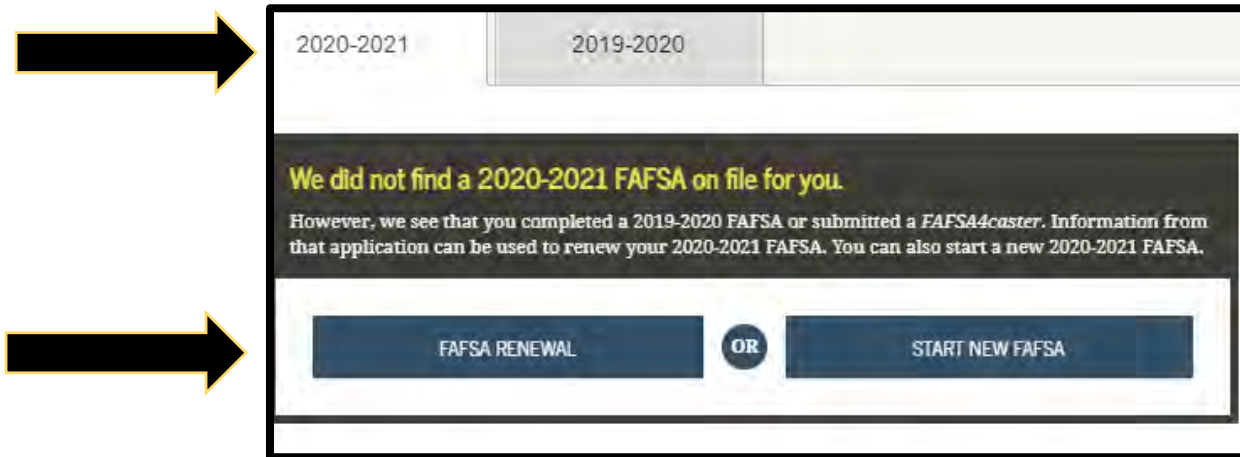
3. Select "I am the student" or "I am a parent, preparer, or student from a Freely Associated State" and click NEXT.

A screenshot of the FAFSA login page. The title "Login" is centered at the top. Below the title, there is a section titled "Log in to the FAFSA" with a paragraph of text: "Only students may use their FSA ID to log in. Parents and others can start a FAFSA for a student by entering the student's identifiers. Parents and others can also work on a FAFSA form or correction the student started using the Save Key that the student made." A link "Help for parents." is provided. In the top right corner, there is a box with the text "Form Approved OMB No. 1845-0001 App. Exp. 12/31/2020." Below the text, there are two radio button options: "I am the student" and "I am a parent, preparer, or student from a Freely Associated State", separated by a circular "OR" button. A blue "NEXT" button with a right-pointing arrow is located at the bottom right.

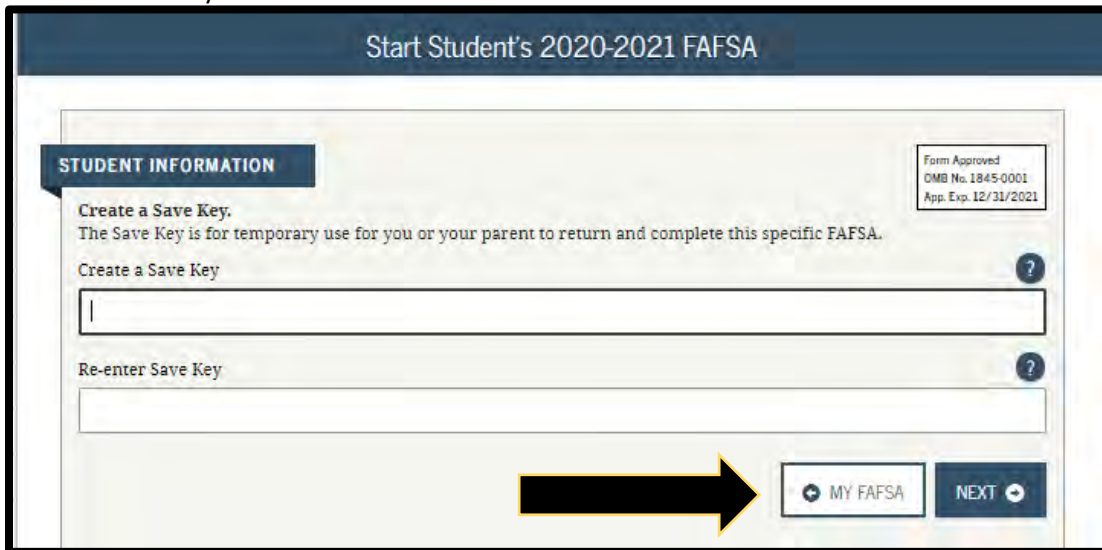
4. Select START 2020-2021 FAFSA **OR**

FOR CORRECTIONS: Make sure the tab at the top has the correct aid year selected. Click Make FAFSA Corrections, hyperlinked at the bottom of the page.

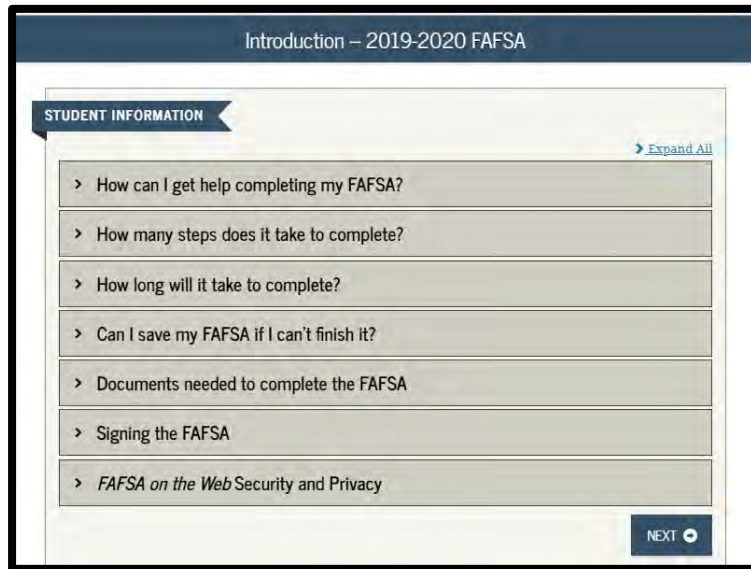
FOR NEW FAFSA SUBMISSION: Make sure the tab at the top has the correct aid year selected. Click “FAFSA RENEWAL” if you, the student, have ever submitted a FAFSA in the past. If not, click “START NEW FAFSA”



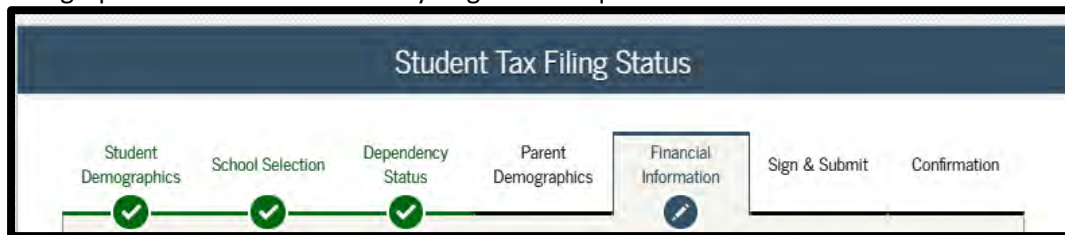
5. Create a Save Key and click NEXT:



6. Review the information as needed and click NEXT.



7. Navigate to the Financial Information tab. *NOTE* For parent tax data, navigate to the Parent Demographics Tab. Click NEXT until you get to the questions listed below.



8. Select the answers that correspond. If you are eligible for the IRS Data Retrieval Tool, you will be prompted with a button. Click the LINK TO IRS button.

The screenshot shows the IRS Data Retrieval Tool section of the FAFSA form. It contains three questions with dropdown menus: 'For 2018, have you completed your IRS income tax return or another tax return?' (selected: Already completed), 'What income tax return did you file for 2018?' (selected: IRS 1040), and 'For 2018, what is your tax filing status according to your tax return?' (selected: Married-Filed Joint Return). Below the questions is a section for the IRS Data Retrieval Tool with a 'LINK TO IRS' button. At the bottom, there are 'PREVIOUS' and 'NEXT' buttons.

9. You will be notified that you are leaving the FAFSA Website. Select PROCEED TO IRS SITE.

Student Demographics School Selection Dependency Status Parent Demographics **Financial Information** Sign & Submit Confirmation

STUDENT INFORMATION

Leaving FAFSA on the Web

You 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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10. Enter the information requested. This should match your tax return exactly. Click SUBMIT.
This may look different for 2018 tax return, but it's the same information

IRS.gov Return to FAFSA | Log Out | Help Español

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

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

| | |
|--|--|
| First Name * | <input type="text"/> |
| Last Name * | <input type="text"/> |
| Social Security Number * | *** - ** <input type="text"/> |
| Date of Birth * | <input type="text"/> / <input type="text"/> / <input type="text"/> |
| Filing Status * | Select One |
| Address - Must match your 2017 Federal Income Tax Return. | |
| Street Address * | <input type="text"/> |
| P.O. Box (Required if entered on your tax return) | <input type="text"/> |
| Apt. Number (Required if entered on your tax return) | <input type="text"/> |
| Country * | United States |
| City, Town or Post Office * | <input type="text"/> |
| State / U.S. Territory * | Select One |
| ZIP Code * | <input type="text"/> |

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

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.

Return to FAFSA Submit

[IRS Privacy Policy](#)

11. Check “Transfer My Tax Information into the FAFSA Form”. Click TRANSFER NOW.
This may look different for 2018 tax return, but it’s the same information

IRS.gov [Return to FAFSA](#) | [Log Out](#) | [Help](#)
[Español](#)

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

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

Print this page for your records before choosing an option below.

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](#) [?](#)

[IRS Privacy Policy](#)

12. You should be directed back to the FAFSA. Click NEXT, and answer the remaining questions until you navigate to the Sign & Submit tab.

Student IRS Info

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

STUDENT INFORMATION

You have successfully transferred your 2018 IRS tax information.

Your 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 (and your spouse’s) adjusted gross income for 2018? [?](#)

Transferred from the IRS

[PREVIOUS](#) [NEXT](#)

Site Last Updated: Sunday, December 15, 2019 [Download Adobe Reader](#)

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13. Click SIGN THIS FAFSA for the appropriate parties. If any information was changed in the parent section, they will need to enter their FSA ID and Password.

The screenshot shows the 'Signature Options' page. At the top, a progress bar indicates the following steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The first five steps are marked with green checkmarks, while 'Sign & Submit' is marked with a blue pencil icon. Below the progress bar, there is a section titled 'Student Signature for' with a circular icon of a document and a pen. To the right of the icon, the text reads: 'Social Security Number: [redacted]', 'Last Name: [redacted]', and 'Date of Birth: [redacted]'. Below this information is a large blue button labeled 'SIGN THIS FAFSA' with a pencil icon. At the bottom right of the page, there are two buttons: 'SIGNATURE STATUS' and 'NEXT'.

14. Click SUBMIT MY FAFSA NOW.

The screenshot shows the 'Sign & Submit' page. At the top, there is a blue header with the text 'Sign & Submit'. Below the header, there is a button labeled 'VIEW OR PRINT YOUR FAFSA INFORMATION'. The main section is titled 'Student Signature' and contains the following information: 'Student's Social Security Number [redacted]', 'Student's last name [redacted]', and 'Student's date of birth [redacted]'. Below this information, there is a section titled 'READ BEFORE PROCEEDING' with a scrollable text area containing the following text: 'By signing this application electronically using your FSA ID (username and password) and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:'. Below the scrollable text area, there is a list of five numbered items: 1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education, 2. are not in default on a federal student loan or have made satisfactory arrangements to repay it, 3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it, 4. will notify your school if you default on a federal student loan, and 5. will not receive a Federal Pell Grant from more than one school for the same. Below the list, there is a line of text: 'I, the student, agree to the terms outlined above.' followed by two radio buttons: 'Agree' (which is selected) and 'Disagree'. Below the radio buttons, there is a blue button labeled 'SIGN'. At the bottom of the page, there are two buttons: 'PREVIOUS' and 'SUBMIT MY FAFSA NOW'.