

2019-2020 IRS Data Retrieval Instructions

Go to <https://studentaid.ed.gov/sa/fafsa>.

Log in with the student's FSA ID and password.

- If you are a new user filling out the FAFSA for the first time, click “Start Here.”
- If you are a returning user, select “Log in.” Then, select “Make FAFSA Correction” and click Next.

Select the “Financial Information” section from the menu bar at the top of the page.

The screenshot shows the 'Parent Tax Filing Status' section of the FAFSA application. At the top, a progress bar indicates the following steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information (current step), Sign & Submit, and Confirmation. The 'Financial Information' section is highlighted with a blue bar. Below the progress bar, a green checkmark icon and the text 'Application was successfully saved.' are displayed. A blue-bordered box contains an 'Attention!' message: 'You must provide financial information from your parents' 2017 tax return on the following pages.' Below this, there are three questions with dropdown menus or radio buttons: 1. 'For 2017, have your parents completed their IRS income tax return or another tax return?' with a dropdown menu showing 'Already completed'. 2. 'For 2017, what is your parents' tax filing status according to their tax return?' with a dropdown menu showing 'Married-Filed Joint Return'. 3. 'Did your parents file a Puerto Rican or foreign tax return for 2017?' with radio buttons for 'Yes' and 'No' (selected). Below these questions is a dark blue box for the 'IRS Data Retrieval Tool' with the text: 'Applying is faster and easier if your parents transfer their tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!'. A blue button labeled 'LINK TO IRS' is positioned below the text. At the bottom right, there are 'PREVIOUS' and 'NEXT' buttons.

This is the 2019-2020 “Parent Tax Filing Status” view.

Parents who filed amended tax returns are eligible to use the IRS DRT. However, because the IRS is unable to transmit amended tax information, data transferred from the IRS into fafsa.gov will be the original tax information. Please be aware if you amended your taxes and use the DRT process, you may be asked for additional documentation by the Student Financial Planning office.

- You will be asked if you have completed your 2017 IRS Income Tax Return. You must be able to select “Already Completed” to continue.
- You will be asked the following question: Did you (or your parents) file a Puerto Rican or foreign tax return for 2017? You must be able to answer No to this question to proceed.
- If eligible, click “Link to the IRS.”

Parent Log In to IRS DRT

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

PARENT INFORMATION

You, the parent, should enter the information below and click **Next** to continue. Otherwise, click **Skip IRS DRT**.

If you have any questions or problems using this tool, click [FAFSA Help](#) for assistance.

Provide Parent's FSA ID

Which parent are you? ?

☒ Parent 1 ☐ Parent 2

Parent's FSA ID Username or Verified E-mail Address ?

Pas0002

[Forgot Username](#) | [Create an FSA ID](#)

Parent's FSA ID Password ?

.....

[Forgot Password](#)

[SKIP IRS DRT](#) [NEXT](#)

2019-2020 “Parent Log In to the IRS DRT” view.

This is a new view asking which parent will be accessing the IRS DRT.

- Enter the either the Student, Parent 1, or Parent 2 FSA ID username and password as needed.

Parent Leaving FAFSA

Student Demographics

School Selection

Dependency Status

Parent Demographics

Financial Information

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

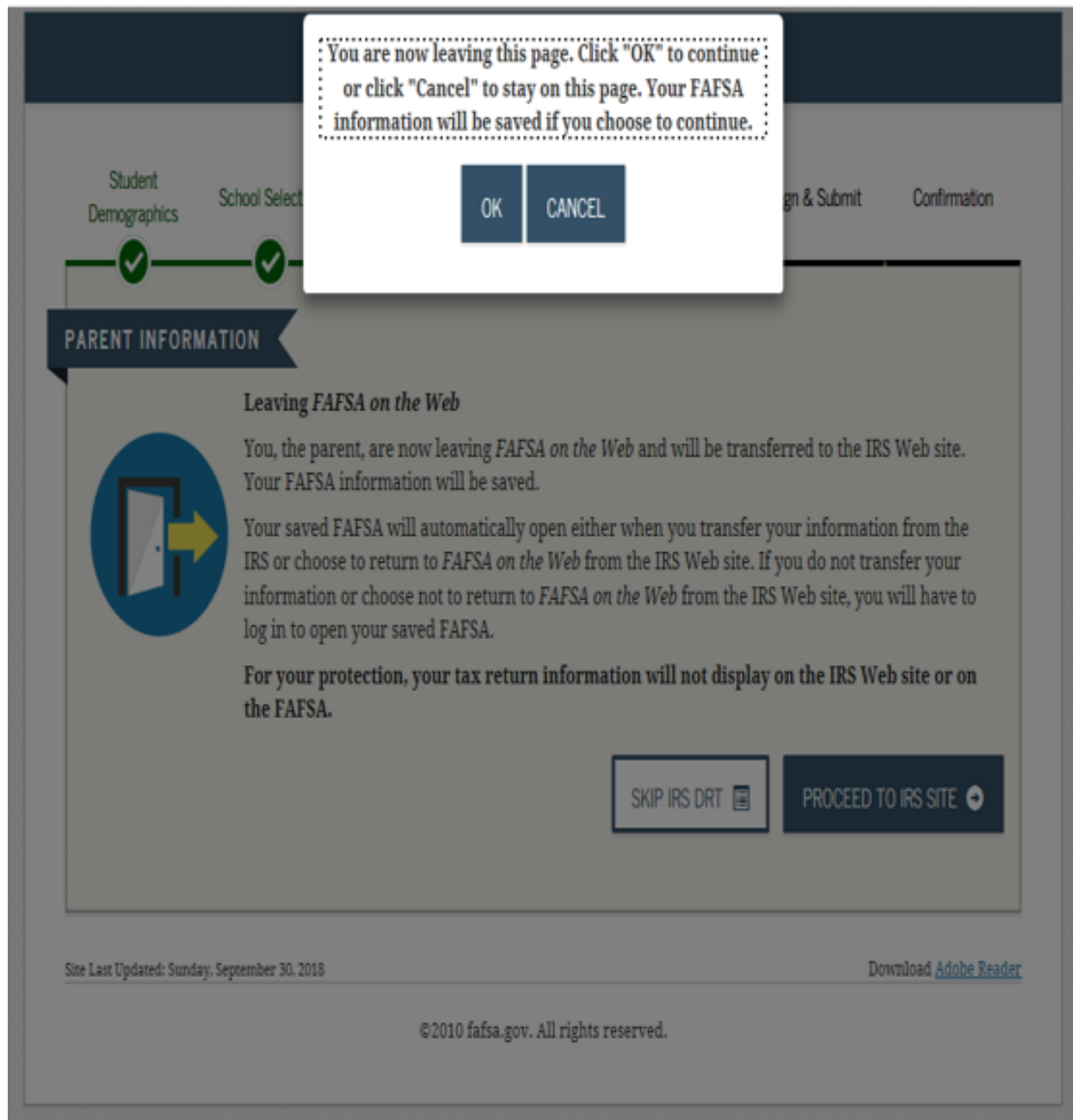
PROCEED TO IRS SITE

Site Last Updated: Sunday, September 30, 2018

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- Click “Proceed to IRS Site.”



You will receive a prompt stating that you are now leaving FAFSA on the Web.

- Click OK.

[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 *	First
Last Name *	
Social Security Number *	
Date of Birth *	
Filing Status * ?	
Address - Must match your tax return	
Street Address *	
P.O. Box (Required if using a P.O. Box)	
Apt. Number (Required if using an apartment)	
Country *	
City, Town or Post Office *	
State/U.S. Territory *	
ZIP Code *	

Message from webpage

 **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).

OK


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](#)

You will receive a prompt stating that you are now using and entering a Government website.

- Select OK.


[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 *	GDIT
Last Name *	data
Social Security Number *	*** - ** - 2614
Date of Birth *	01 / 01 / 1999
Filing Status * ?	Married-Filed Joint Return ▼
Address - Must match your 2017 Federal Income Tax Return. ?	
Street Address *	
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	
Country *	United States ▼
City, Town or Post Office *	
State / U.S. Territory *	Select One ▼
ZIP Code *	


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

[Return to 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.

[Submit](#)

- Review the prefilled information and make sure that the first name, last name, social security number and date of birth are correct.
- Select the appropriate filing status.


[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 *	GDIT
Last Name *	data
Social Security Number *	*** - ** - 2614
Date of Birth *	01 / 01 / 1999
Filing Status * ?	Married-Filed Joint Return v
Address - Must match your 2017 Federal Income Tax Return. ?	
Street Address *	4050 alpha rd test
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	
Country *	United States v
City, Town or Post Office *	farmers ranch
State / U.S. Territory *	Texas (TX) v
ZIP Code *	75244

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


Return to 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.

Submit

[IRS Privacy Policy](#)

- Enter the address EXACTLY as it is shown on your tax return (word for word, abbreviation for abbreviation, any punctuation (such as a period) after abbreviation, case sensitive).
- Select "Submit."
- Please note that you have 3 attempts to enter this information. If you do not move to the next screen after you enter your information, you have 2 attempts left. Double check your information to make sure it matches your tax return.



[Return to FAFSA](#) | [Log Out](#) | [Help](#)

[Español](#)

2017 Federal Income Tax Information

Gedit Data


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.

[Transfer Now](#) 

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.

[Do Not Transfer](#) 

[IRS Privacy Policy](#)

You will now see a summary page of the information that will be transferred into the FAFSA

- Scroll to the bottom of the page.
- Check the box to the left of the "Transfer Data to FAFSA" option.
- Select "Transfer Now."

Parent IRS Info

Student Demographics

School Selection

Dependency Status

Parent Demographics

Financial Information

Sign & Submit

Confirmation

PARENT INFORMATION

What type of income tax return did your parents file for 2017?
Transferred from the IRS

What was your parents' adjusted gross income for 2017?
Transferred from the IRS

PREVIOUS

NEXT

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You will receive notification that the data has been successfully transferred and will be directed back to the FAFSA.