

The following help sheet is intended to guide you through the process of updating your FAFSA using the IRS Data Retrieval Tool. These instructions assume that you have been able to successfully log into the FAFSA and complete the first four steps in the process (Student Demographics, School Selection, Dependency Status, and Parent Demographics, if applicable.)

1. On the "Financial Information" tab, select	Student Decemberry December Decemberry				
"Already completed" from the drop-down list.	Demographics School Selection Status Demographics Financials Sign & Submit Confirmation				
	STUDENT INFORMATION				
	Application was successfully saved.				
	because the FAFSA belongs to the student, you and your always (unless otherwise noted) refer to the student.				
	Attention! You must provide financial information from your 2018 tax return on the following pages.				
	For 2018, have you completed your IRS income tax return or another tax return?				
Student Tax Filing Status	Already completed				
	What income tax return did you file for 2018?				
Student School Selection Dependency Parent Parent Student Student Sign & Submit Confirmation	Ene 2018 what is your far filling status according to your tay nation?				
	Select				
STUDENT INFORMATION					
Application was successfully saved.	• PREVIOUS NEXT •				
Because the FAFSA belongs to the student, "you" and "your" always (unless otherwise noted)	Site Lass Updated: Sunday, September 29, 2019 Download Adobe Reader				
refer to the student.	2 Read and answer the questions that will				
	help determine if you qualify to use the tool				
Attention! You must provide financial information from your 2018 tax return on the following pages.	The questions will pertain to your tay return				
	tupe and tax filing status for 2018				
For 2018, have you completed your IRS income tax return or another tax return?	type and tax ming status for 2018.				
What income tax return did you file for 2018?					
Married-Filed Joint Return					
IRS Data Retrieval Tool	3. Click the "Link to IRS" button to go to the				
Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval	IRS website and transfer your current tax				
1001(183.081))	information directly to your FAFSA				
LINK TO IPS 🛱					
PREVIOUS NEXT					



4. Read the next screen and select "Proceed to IRS Site."

Student Sc mographics	hool Selection	Dependency Status	Parent Demographics	Parent Financials	Student Financials	Sign & Submit	Confirmation
DENT INFORM	MATION						
	Leaving FA	FSA on the	Web				
	You have en responses a your IRS ta	ntered answ ind replace t x informatic	ers to one or mo them with inforr on into this FAFS.	re income que nation contain A.	stions. FAFSA or ed in your tax r	n the Web will de eturn when you i	lete these ransfer
C	You are not IRS tax info	v leaving FA rmation. Yo	FSA on the Web ur FAFSA inform	and will be tra nation will be s	nsferred to the l aved.	IRS Web site to a	cess your
	Your saved or choose to information log in to op	FAFSA will a preturn to F n or choose p en your save	automatically op AFSA on the Wel not to return to 1 ed FAFSA.	en either whei 6 from the IRS ' FAFSA on the W	n you transfer y Web site. If you Yeb from the IRS	our information do not transfer y Web site, you w	from the IRS our Il have to
	For your p the FAFSA	rotection, y	our tax return	information w	ill not display	on the IRS Web	site or on
				sk	ip iris drt 🗐	PROCEED TO	IRS SITE O

5. A warning message will pop up for the second time, notifying you that you are leaving the FAFSA website. Say "OK" to proceed.

6. The link should open the IRS.gov website. Fill in the appropriate information (some of it will be pre-populated for you) and click "Submit." Note that the address must match your Federal Income Tax Return in order to retrieve your information.

Married-Filed Joint Return
Street Address 🕐
Must match your 2018 Federal Income Tax Return
PO Poy @
Required if entered on your tax return
Apartment Number
Required if entered on your tax return
Country
United States •
City, Town or Post Office
State / U.S. Territory
Select One •
ZIP Code
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 clvil and criminal penalties.
SUBMIT
Select the button below to exit the IRS system and return to your FAFSA.
CANCEL



Return to FAFSA | Help | Logout 🗭 | Español

HELP SHEET – USING THE IRS DATA RETRIEVAL TOOL

MIRS

7. If you entered your information exactly as it appears on your 2018 taxes, your income tax information will be located. Review the information that may be transferred from the list provided and select "Transfer My Tax Information into the FAFSA Form" checkbox. Then click "Transfer Now."

8. The relevant Income Tax Information will be transferred from the IRS to your FAFSA. Those fields will all say, "Transferred from the IRS" but will not display actual values. DO NOT CHANGE THE TRANSFERRED DATA.

9. For dependent students, repeat this process for your parents' tax information.

2018 Federal Income Tax Information Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permi 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 Refer to your tax records if you have a guestion 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 TRANSFER NOW ? appropriate FAFSA questions. After the FAFSA questions are popula 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.

Student IRS Info Student Parent Parent Dependency Student School Selection Sign & Submit Confirmation Status Demographics Demographics Financials Financials Ø 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 O PREVIOUS NEXT 🔿 Site Last Updated: Sunday, September 29, 2019 Download Adobe Reader ©2010 fafsa.gov. All rights reserved.

Once you have transferred tax information from the IRS to your FAFSA **DO NOT CHANGE ANY OF THE TRANSFERRED DATA ELEMENTS.** We can only accept tax information from the IRS that is unchanged as accurate documentation of your current tax data. If you feel the information you transferred is inaccurate, contact the Office of Student Financial Aid for further instructions.