Step-by-Step Instructions for Using the IRS Data Retrieval Tool on the FAFSA

To use the IRS data Retrieval Tool you must first file your tax return and wait 3 weeks if you file electronically, or 11 weeks if you mail in your returns.

After that time period, go back to https://fafsa.ed.gov, click “login,” and enter your “student information.” On the welcome page, choose the option to “Make FAFSA Corrections.” Enter your PIN, create a password, and then navigate past the “introduction page” to the tab for “financial information” listed below. Both you and your parents (if applicable) will need to go to your separate financial information sections on the FAFSA.

1. When you get to the step for “student/parent tax information” you will be prompted to answer whether you have completed your tax return.

Use the drop-down menu to indicate that you/your parent’s IRS income tax return have been “already completed.”

2. Once you select this option, a box will appear with a few more questions regarding the type of tax return that was completed. If the answer to all the questions is “no” then a second box will appear.
(The questions will restrict you from using the IRS Data Retrieval option if you indicate that any of the following apply:

- Your marital status changed after December 31st (from the Tax Year requested)
- You or they filed “married filing separately”
- You or they indicated “married” on the FAFSA but filed “head of household” on the tax return
- You or they filed an amended return
- You or they filed a foreign tax return

You may later be required to request a tax transcript from the IRS.)

3. The second box that appears will prompt you to select your status (Student/Mother/Father/Step-Parent) and enter your PIN. Immediately after entering your PIN, click the “link to IRS” button.

4. If eligible to use the tool, you will be transferred to the IRS Website. FAFSA-on-the-Web will notify you that you are leaving the FAFSA website and entering the IRS website to complete the transfer of your tax information. Click ok.
5. On the IRS Web site, you will be prompted to enter information as it appears on your tax return. It is important that you complete this section exactly as it appears on your tax return or your information may not match with IRS records and the data retrieval may not go through.

6. Once the IRS has authenticated your identity, your IRS tax information will display. You may then choose to transfer your information from the IRS into your FAFSA by checking the “Transfer My Tax Information into the FAFSA” and clicking “Transfer Now” button (see below).
After you have transferred your data, you will be returned to the FAFSA-on-the-Web website to finish your application. **Make sure not to change any of the financial data that was imported from the IRS Website.** Remember that both you and your parents (if applicable) will need to go through a separate authentication process when filling out the Financial Information sections of the FAFSA.

7. To submit your updated FAFSA containing your/your parent’s IRS date information you must click “submit my FAFSA now.”