Using the IRS Data Retrieval Tool to transfer your tax information to the FAFSA
• Step 1) Login to FAFSA.gov. If you’ve already applied click on ‘Returning User’. If not, go to ‘Start a New FAFSA’.
Step 2) Enter information to login. Then click ‘next’.
Step 3a) If submitting a correction, go to the Financial Information OR the Parent Financial Information tab.
Step 3b) If you’re filling out the FAFSA for the first time, you’ll need to answer all questions in the Demographics, School Selection and Dependency Status sections and then look for the IRS link in the Student/Parent Financial Information sections.
Step 4) If your answer to the following is ‘none of the above’ you can use the IRS data link.
Step 5) Once the link pops up you can click on it.
Step 6) Your computer must be set to allow pop-ups. You’ll see a warning that you’re leaving the FAFSA website. Click ‘OK’.
Step 7) Fill in form at the IRS database to retrieve tax information. Then click submit.
Step 8) When finished click ‘return to FAFSA’. Make sure to sign and submit at FAFSA.gov using your PIN.
Things to be aware of:

- If you (or your parents) did NOT file taxes you/they will not be able to use the IRS link.

- When you are finished using the data retrieval tool you must return to the FAFSA and submit the correction. You (and your parent if applicable) must sign the correction using your PIN.

- You must put in the same information at the IRS webpage that you used when you filed your taxes, even if it has changed since then. If possible, have your tax return in front of you to refer to and be sure to use the same combination of upper and lowercase letters as you used on the 1040 form.

- If your parents filed a joint return their names must be listed in the same order as they were on the IRS 1040 form.

- If your tax information doesn’t successfully transfer you may need to order a transcript from the IRS.