Guide to Using the IRS Data Retrieval Tool
Step 1: Go to www.FAFSA.gov.

- If this is your initial application, click Start a New FAFSA.
- If you are making a correction to an already processed FAFSA, click Login, ensure the correct aid year is selected on the blue tab, and click on the Make FAFSA Correction link.
Step 2: Once you complete the questions on the first four tabs of the FAFSA, you’ll get to the Financial Information tab where you’ll have the option to link to the IRS.

Answer the first two questions:

• For 2015, have you completed your IRS income tax return or another tax return?

• For 2015, what is your tax filing status according to your tax return?
Step 3: You’ll then be asked two questions that will determine whether or not you are eligible to use the Data Retrieval Tool.

If you answered ‘Yes’ to either of these questions, the IRS Data Retrieval Tool will not be available for you, and you will need to manually enter your tax information for each question.

If you answered ‘No’ to these questions, click the ‘Link to IRS’ button.
Step 4: You’ll come to a “Leaving FAFSA on the Web” page. Click on the “Proceed to IRS Site” button.

If you are submitting parent information, you will first need to enter the FSA ID Username and Password for the parent.

To create an FSA ID, visit [https://fsaid.ed.gov](https://fsaid.ed.gov).
Step 5: You’ll see a warning text box. Click OK.
Step 6: Enter your personal information and click Submit.

Note: You must type your information (including address) exactly as it appears on your tax return, even if your information has changed.

Getting an error message? Review the information on the last page of this guide.
Step 7: If the IRS is able to validate your information, check the “Transfer my Information into the FAFSA” box and click “Transfer Now.”

<table>
<thead>
<tr>
<th>Income Tax</th>
<th>$8,900</th>
<th>Question 86 on the FAFSA</th>
</tr>
</thead>
<tbody>
<tr>
<td>IRS Exemptions</td>
<td>1</td>
<td>Question 87 on the FAFSA</td>
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<tr>
<td>Education Credits</td>
<td>$5,900</td>
<td>Question 93a on the FAFSA</td>
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<td>IRA Deductions and Payments</td>
<td>$4,400</td>
<td>Question 94b on the FAFSA</td>
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<tr>
<td>Tax-Exempt Interest Income</td>
<td>$4,650</td>
<td>Question 94d on the FAFSA</td>
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<tr>
<td>Untaxed IRA Distributions</td>
<td>$7,900</td>
<td>Question 94e on the FAFSA</td>
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<tr>
<td>Untaxed Pensions</td>
<td>$6,900</td>
<td>Question 94f on the FAFSA</td>
</tr>
</tbody>
</table>
Step 8: You’ll be taken back to the *Financial Information* tab of the FAFSA, and you’ll now see fields pre-populated with data from your tax return.

**Note:** Do not update any answers that say ‘Transferred from the IRS.’ Doing so can invalidate your FAFSA and you may be required to submit additional documentation at a later date.

If you are using the IRS Data Retrieval Tool for both the student and parent, you will have to complete this process twice.
Step 9: Click ‘Save’ at the bottom of the screen and continue with the ‘Next’ button through any remaining sections until you reach the last section to sign and submit your FAFSA.
Did you get an error message indicating that the address you entered does not match the address that the IRS has on record for you?

If you know you entered it correctly from your tax return, the IRS may have standardized it to conform to United States Postal Service (USPS) specifications.

To look up your standardized address, use the **Look Up a Zip Code** tool on the USPS website at: [https://tools.usps.com/go/ZipLookupAction!input.action](https://tools.usps.com/go/ZipLookupAction!input.action).

Then return to the IRS Data Retrieval Tool and try your request using your standardized address.