



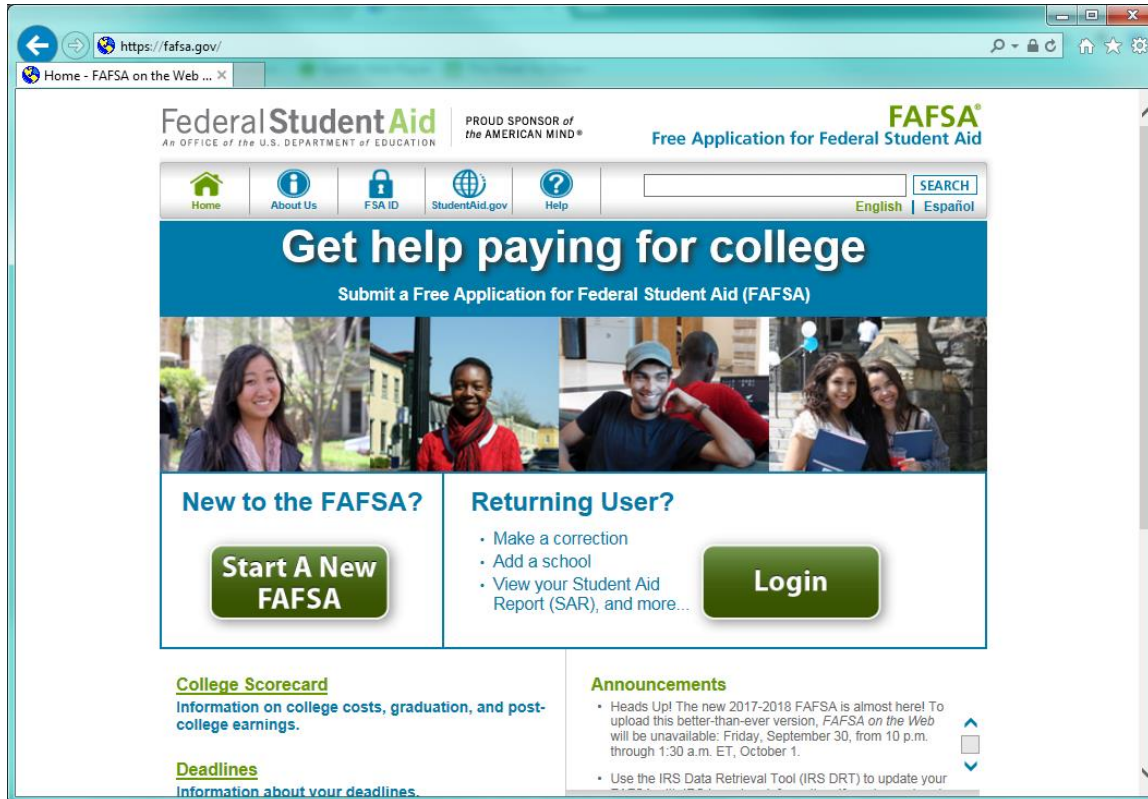
UNIVERSITY *of*  
DENVER

FINANCIAL AID



## Guide to Using the IRS Data Retrieval Tool

# Step 1: Go to [www.FAFSA.gov](https://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.

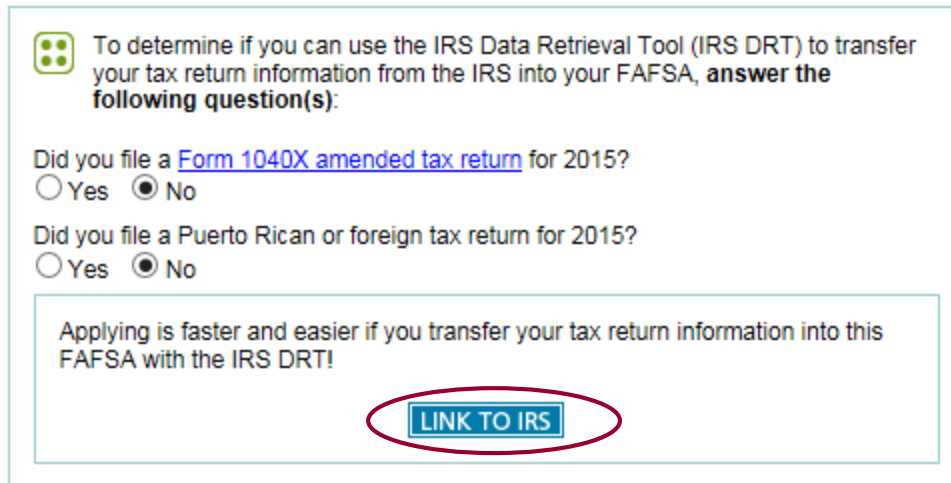
The screenshot shows the FAFSA application interface. The browser address bar displays <https://fafsademotest.ed.gov/FAFSA/app/fafsa?execution=e2s15>. The page header includes the Federal Student Aid logo, the text "PROUD SPONSOR of the AMERICAN MIND®", and the FAFSA logo with the tagline "Free Application for Federal Student Aid". A navigation bar at the top contains tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information (which is the active tab), Sign & Submit, and Confirmation. The main content area is titled "Student Tax Information". It features a blue sidebar on the left with the word "STUDENT" written vertically. The main content area has a blue header with the title "Student Tax Information". Below the header, there is a blue box with a white information icon and the text: "Attention! You must provide financial information from your 2015 tax return on the following pages." Below this, there is a green box with a white checkmark icon and the text: "Application was successfully saved." The main content area contains two questions. The first question is: "For 2015, have you completed your IRS income tax return or another tax return?" with a dropdown menu showing "Already completed". The second question is: "For 2015, what is your tax filing status according to your tax return?" with a dropdown menu showing "Select". The dropdown menu is open, displaying the following options: Single, Head of Household, Married-Filed Joint Return, Married-Filed Separate Return, Qualifying Widow(er), and Don't know. Below the dropdown menu, there are buttons for "PREVIOUS", "NEXT", "DATA", "VIEW FAFSA SUMMARY", and "EXIT". On the right side of the page, there is a "Help and Hints" section titled "Student's 2015 Tax Return Filing Status Question 34". It contains text explaining that if you filed or will file a tax return, you must select your tax return filing status for 2015. It lists the following options: Single, Head of Household, Married-Filed Joint Return, Married-Filed Separate Return, Qualifying Widow(er), and Don't know. It also includes instructions for selecting the tax return filing status from the "Filing Status" field of your tax return. At the bottom of the page, there is a footer that says "Site Last Updated: Sunday, September 25, 2016" and a link to "Download Adobe Reader".

**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.

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The screenshot shows a web form with a green icon of four dots in a square. The text reads: "To determine if you can use the IRS Data Retrieval Tool (IRS DRT) to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):". Below this are two questions, each with "Yes" and "No" radio button options. The first question is "Did you file a [Form 1040X amended tax return](#) for 2015?" with "No" selected. The second question is "Did you file a Puerto Rican or foreign tax return for 2015?" with "No" selected. Below the questions is a light blue box containing the text "Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS DRT!" and a blue button labeled "LINK TO IRS" which is circled in red.

To determine if you can use the IRS Data Retrieval Tool (IRS DRT) to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):

Did you file a [Form 1040X amended tax return](#) for 2015?  
☐ Yes ☒ No

Did you file a Puerto Rican or foreign tax return for 2015?  
☐ Yes ☒ No

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS DRT!

[LINK TO IRS](#)

**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.

Federal Student Aid | PROUD SPONSOR of the AMERICAN MIND® | FAFSA® Free Application for Federal Student Aid

Help

SEARCH

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

**Leaving FAFSA on the Web**

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. 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.

Which parent are you?  
Select

What is your (the parent's) FSA ID?  
FSA ID Username or Verified E-mail Address  
FSA ID Password

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

Click **Proceed to IRS Site** to continue. Otherwise, click **Skip IRS Transfer**.

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

**SKIP IRS TRANSFER** **PROCEED TO IRS SITE**

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>.

## Step 5: You'll see a warning text box. Click OK.

The screenshot shows the IRS.gov website interface. At the top, there's a dark blue header with the IRS logo and text "Return to FAFSA | Log Out | Help" and "Español". Below this is a section titled "Get My Federal Income Tax Information" with a link to the "Privacy Notice". The main heading says "Enter the following information from your 2015 Federal Income Tax Return." followed by a question mark icon and "Required fields \*". A form is partially visible with a "First Name \*" field containing the letter "m". A white warning modal box is overlaid on the form. The modal contains the text: "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)." and an "OK" button. Below the modal, the form fields continue: "Street Address \*", "P.O. Box (Required if entered on your tax return) ?", "Apt. Number (Required if entered on your tax return)", "Country \*" (set to "United States"), "City, Town or Post Office \*", "State/U.S. Territory \*" (set to "Select One"), and "ZIP Code \*". At the bottom of the page, there are two buttons: "Return to FAFSA" and "Submit".

IRS.gov

[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 2015 Federal Income Tax Return.** ? Required fields \*

First Name \* m

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

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

## 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.

[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 2015 Federal Income Tax Return. [?](#) Required fields \*

First Name *	GDIT
Last Name *	data
Social Security Number *	*** - ** - 2656
Date of Birth *	01 / 01 / 1992
Filing Status * <a href="#">?</a>	Married-Filed Joint Return <a href="#">v</a>
Address - Must match your 2015 Federal Income Tax Return. <a href="#">?</a>	
Street Address *	4050 ALPHA RD TEST
P.O. Box (Required if entered on your tax return) <a href="#">?</a>	
Apt. Number (Required if entered on your tax return)	
Country *	United States <a href="#">v</a>
City, Town or Post Office *	farmers branch
State/U.S. Territory *	Texas (TX) <a href="#">v</a>
ZIP Code *	75244

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](#)


[IRS Privacy Policy](#)



**Step 7:** If the IRS is able to validate your information, check the “Transfer my Information into the FAFSA” box and click “Transfer Now.”

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		and/or Parent 2: Question 89 on the FAFSA
Income Tax	\$8,900	Question 86 on the FAFSA
IRS Exemptions	1	Question 87 on the FAFSA
Education Credits	\$5,900	Question 93a on the FAFSA
IRA Deductions and Payments	\$4,400	Question 94b on the FAFSA
Tax-Exempt Interest Income	\$4,650	Question 94d on the FAFSA
Untaxed IRA Distributions ?	\$7,900	Question 94e on the FAFSA
Untaxed Pensions ?	\$6,900	Question 94f on the FAFSA

 Print this page for your records before choosing an option below.

**Transfer My Tax Information into the FAFSA ?**

- ☒ The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

**Transfer Now** ?

**Do Not Transfer My Tax Information and Return to the FAFSA ?**

- ☐ 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. You may still use this tax information to input the data into your FAFSA.

**Do Not Transfer** ?

[IRS Privacy Policy](#)



**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.

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**Parent Financial Information continued**

Enter the amount of your parents' income tax for 2015. This amount is found on IRS Form 1040-lines (56 minus 46).

\$  .00 **Transferred from the IRS**

Enter your parents' exemptions for 2015. This amount is found on IRS Form 1040-line 6d.

**Transferred from the IRS**

Did your parents have any of the following items in 2015? Check all that apply and provide amounts.

**2015 Additional Financial Information**

☒ **American Opportunity Tax Credit or Lifetime Learning Tax Credit**  
Education credits (American Opportunity Tax Credit or Lifetime Learning Tax Credit) from IRS Form 1040-line 50  
\$  .00 **Transferred from the IRS**

☐ Child support paid

☐ Taxable earnings from Work-study, Assistantships or Fellowships

☐ College grant and scholarship aid reported to the IRS

☐ Combat pay or special combat pay

☐ Cooperative education program earnings

**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.

**Sign & Submit**

☒ Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a [preparer](#)?  
☐ Yes ☒ No

**Student Signature**

Student's Social Security Number

Student's last name

Student's date of birth

**READ BEFORE PROCEEDING**

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same

I, the student, agree to the terms outlined above.  
☒ Agree ☐ Disagree

[SIGN](#)

[PREVIOUS](#) [SUBMIT MY FAFSA NOW](#)

**Help and Hints**

**Terms of Agreement - Student**

In order to submit your FAFSA, you must review the Terms of Agreement and select **Agree**.

[More>>>](#)

# IRS Error Message

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*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>.

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