Guide to Using the IRS Data Retrieval Tool
Step 1: Go to [www.FAFSA.gov](http://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 2016, have your parents completed their IRS income tax return or another tax return?
- For 2016, what is your parents’ tax filing status according to their tax return?
Step 3: You’ll then be asked if a Puerto Rican or foreign tax return has been filed for 2016.

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

If you answered ‘No’ to this question, 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.
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>
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<tbody>
<tr>
<td>IRS Exemptions</td>
<td>1</td>
</tr>
<tr>
<td>Education Credits</td>
<td>$5,900</td>
</tr>
<tr>
<td>IRA Deductions and Payments</td>
<td>$4,400</td>
</tr>
<tr>
<td>Tax-Exempt Interest Income</td>
<td>$4,650</td>
</tr>
<tr>
<td>Untaxed IRA Distributions</td>
<td>$7,900</td>
</tr>
<tr>
<td>Untaxed Pensions</td>
<td>$6,900</td>
</tr>
<tr>
<td>and/or Parent 2: Question 89 on the FAFSA</td>
<td>Question 86 on the FAFSA</td>
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<tr>
<td>and/or Parent 2: Question 89 on the FAFSA</td>
<td>Question 87 on the FAFSA</td>
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<tr>
<td>and/or Parent 2: Question 89 on the FAFSA</td>
<td>Question 93a on the FAFSA</td>
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<td>Question 94b on the FAFSA</td>
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<td>Question 94d on the FAFSA</td>
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<td>Question 94e on the FAFSA</td>
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<td>and/or Parent 2: Question 89 on the FAFSA</td>
<td>Question 94f on the FAFSA</td>
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</tbody>
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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.

**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.

[IRS Privacy Policy]
Step 8: You’ll be taken back to the Financial Information tab of the FAFSA, and you’ll now see certain fields pre-populated with data from your tax return. Continue to answer the remaining questions.

Note: For security purposes, information populated by the IRS Data Retrieval Tool is not displayed, and you cannot make updates to those fields.

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.
IRS Error Message

*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.