



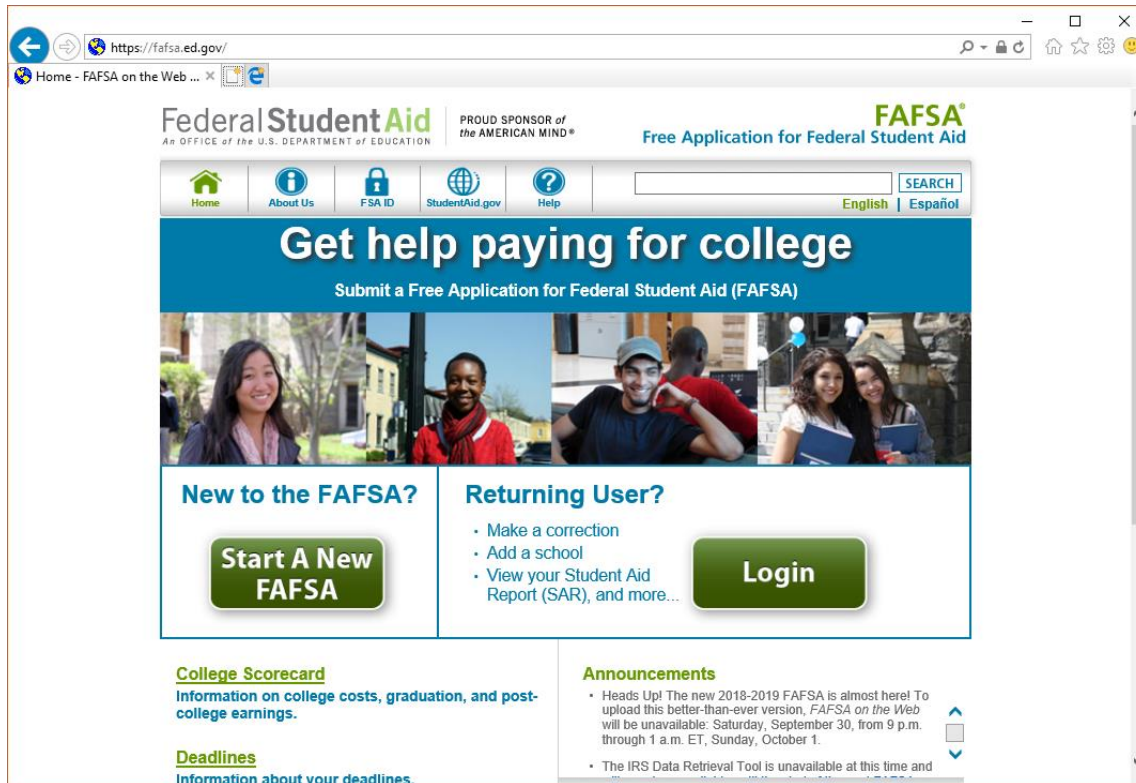
UNIVERSITY *of*
DENVER

FINANCIAL AID



Guide to Using the IRS Data Retrieval Tool

Step 1: Go to [www.FAFSA.gov](https://fafsa.ed.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 top navigation bar includes tabs for 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 'Parent Tax Information' and contains several sections:

- Attention!** You must provide financial information from your parents' 2016 tax return on the following pages.
- A green checkmark icon indicating the application was successfully saved.
- A question: 'For 2016, have your parents completed their IRS income tax return or another tax return?' with a dropdown menu showing 'Already completed'.
- A question: 'For 2016, what is your parents' tax filing status according to their tax return?' with a dropdown menu showing 'Select'.
- A list of filing status options: Single, Head of Household, Married-Filed Joint Return, Married-Filed Separate Return, Qualifying Widow(er), and Don't know.
- Navigation buttons: PREVIOUS, NEXT, NEED HELP?, SAVE, CLEAR ALL DATA, VIEW FAFSA SUMMARY, and EXIT.

On the right side, there is a 'Help and Hints' section titled 'Parent's 2016 Tax Return Filing Status Question 82'. It provides instructions on how to select the correct filing status based on the type of tax return filed (1040 or 1040EZ).

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.

Did you, the parents, file a Puerto Rican or foreign tax return for 2016?

☐ Yes ☒ No



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

[LINK TO IRS](#)

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.

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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 is a dark blue header with the IRS logo and the text 'IRS.gov'. To the right of the header are links for 'Return to FAFSA', 'Log Out', and 'Help'. Below the header, the main heading is 'Get My Federal Income Tax Information'. Under this heading, there is a link to the 'Privacy Notice' and a note about the request for personal information. The main instruction is 'Enter the following information from your 2015 Federal Income Tax Return.' followed by a question mark icon and the text 'Required fields *'. A form is visible with a 'First Name *' field containing the letter 'm'. A white modal box is overlaid on the form, containing a warning message: '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).' An 'OK' button is located at the bottom right of the modal box. Below the modal box, the form continues with fields for 'Street Address *', 'P.O. Box (Required if entered on your tax return) ?' (with a question mark icon), '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'. A disclaimer at the bottom right states: '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.'

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.

[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 * ?	Married-Filed Joint Return ▾
Address - Must match your 2015 Federal Income Tax Return. ?	
Street Address *	4050 ALPHA RD TEST
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 *	farmers branch
State/U.S. Territory *	Texas (TX) ▾
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](#)

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.”

		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 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.

You have already transferred your tax information from the IRS.

[View option to link to the IRS](#)

What type of income tax return did your parents file for 2016? **Transferred from the IRS**

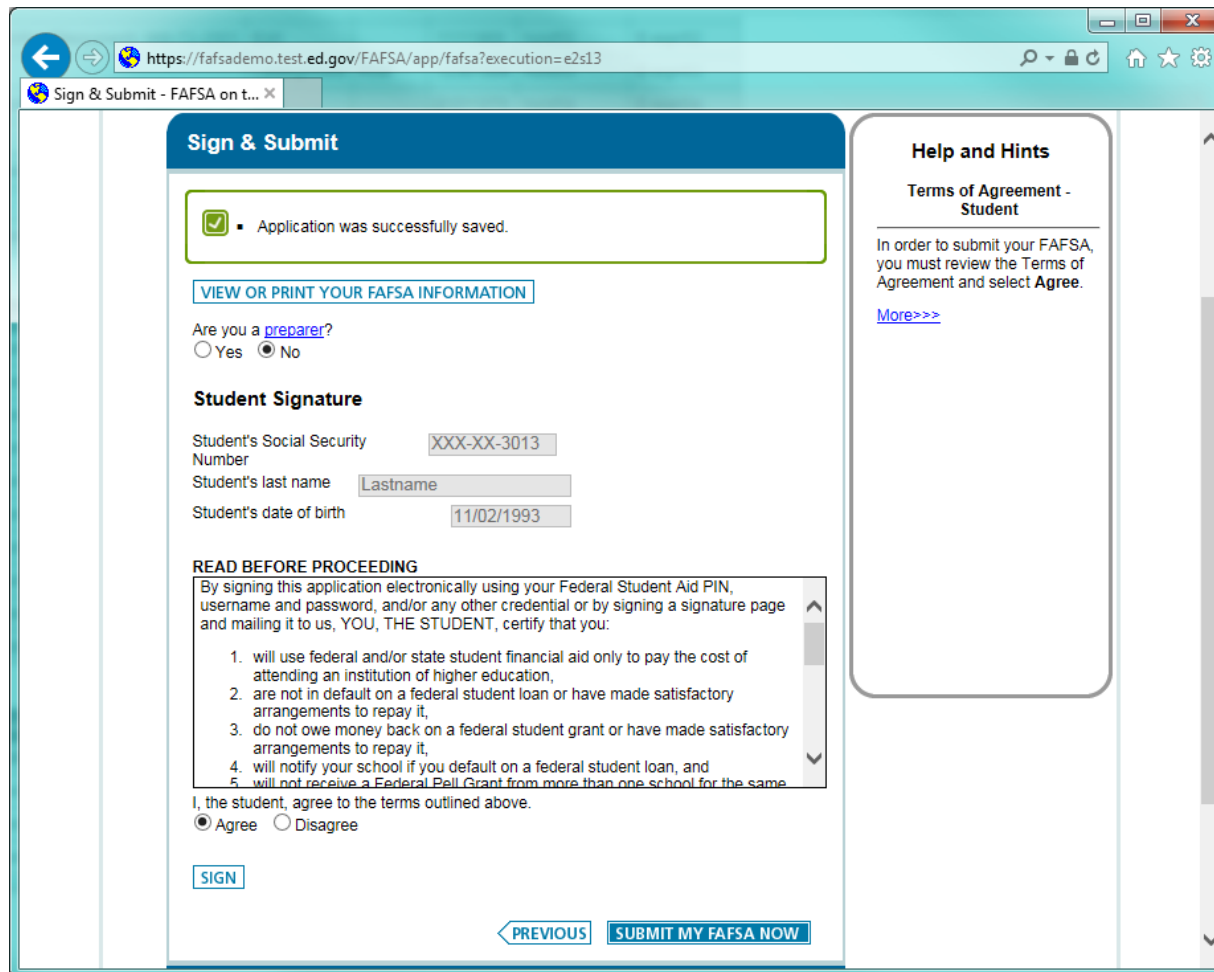
What was your parents' adjusted gross income for 2016? **Transferred from the IRS**

How much did your Parent 1 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2016? \$.00

How much did your Parent 2 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2016? \$.00

Was either of your parents a dislocated worker on the day you submitted your FAFSA? ▼

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.



The screenshot shows the 'Sign & Submit' section of the FAFSA application. The browser address bar displays 'https://fafsademotest.ed.gov/FAFSA/app/fafsa?execution=e2s13'. The page title is 'Sign & Submit - FAFSA on t...'. A green checkmark icon indicates 'Application was successfully saved.' Below this is a button labeled 'VIEW OR PRINT YOUR FAFSA INFORMATION'. A question asks 'Are you a preparer?' with radio buttons for 'Yes' and 'No' (selected). The 'Student Signature' section includes fields for 'Student's Social Security Number' (masked as XXX-XX-3013), 'Student's last name' (Lastname), and 'Student's date of birth' (11/02/1993). A 'READ BEFORE PROCEEDING' box contains a statement about electronic signing and a list of five conditions. Below the box, the student is asked to agree or disagree, with 'Agree' selected. At the bottom are buttons for 'SIGN', 'PREVIOUS', and 'SUBMIT MY FAFSA NOW'. A 'Help and Hints' sidebar on the right contains 'Terms of Agreement - Student' and a 'More>>>' link.

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: XXX-XX-3013
Student's last name: Lastname
Student's date of birth: 11/02/1993

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

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.