Linking Taxes Through FAFSA

Federal Student Aid and the Internal Revenue Service collaborated to develop a solution that simplifies FAFSA completion. The IRS Data Retrieval tool will allow Free Application for Federal Student Aid (FAFSA) on the web applicants to request and retrieve their income and tax data from the IRS. The IRS Data Retrieval Tool allows students and parents to access the IRS tax return information needed to complete the FAFSA. Students and parents may transfer the data directly into their FAFSA.

If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using the tool as it is an easy way to provide tax data and ensures FAFSA has accurate tax information. Please note, if you do not use the IRS Data Retrieval Tool to provide tax information, you may be required to obtain an official tax transcript from the IRS.

Eligibility

For 2018-2019, applicants filing an initial or renewal application or making a correction are eligible to use the IRS Data Retrieval tool if he or she meets all of the following criteria:

- Must have valid SSN
- Must have filed a 2016 federal tax return
- Must have unchanged marital status since December 31, 2015

The following list represents who cannot use the IRS Data Retrieval tool for 2018-2019:

- Parents with all zeroes for SSN
- Any student or parent who indicates they have not already filed a tax return or will not file a tax return
- A married independent applicant and spouse who filed separate tax returns
- Parents of a dependent student who filed separate tax returns

How the Student IRS Data Retrieval Tool works:

On the Financial Information Page you will need to answer the following questions:
- For 2016, have you completed your IRS income tax return or another tax return?
    - If you answer "Already Completed" you are free to move on to the next question.
    - If you answer "Will File" or "Not going to file" you are not eligible to transfer your taxes at this time. Please try again later.
- For 2016, what is your tax filing status according to your tax return?
- Did you file a Puerto Rican or foreign tax return for 2016?

A box will then appear that says:

> Applying is faster and easier if you transfer your tax information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!
>
> Click the button that says "LINK TO IRS"

1. Your FAFSA will be saved and you will be transferred to the IRS Web site.
2. On the IRS Web site, enter the requested information.
3. Once the IRS has validated your identification, you can either **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 from the IRS Web site, you will have to login to open your saved FAFSA.
4. If you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS."
5. See screen example below.

How the Parent IRS Data Retrieval Tool works:

On the Financial Information Page you will need to answer the following questions:
- o For 2016, have you completed your IRS income tax return or another tax return?
    - o If you answer "Already Completed" you are free to move on to the next question.
    - o If you answer "Will File" or "Not going to file" you are not eligible to transfer your taxes at this time. Please try again later.
- o For 2016, what is your tax filing status according to your tax return?
- o Did you file a Puerto Rican or foreign tax return for 2016?

A box will then appear that says:

> Applying is faster and easier if you transfer your tax information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!
>
> Click the button that says "LINK TO IRS"

1. Your FAFSA will be saved and you will be transferred to the IRS Web site.
2. On the IRS Web site, enter the requested information.
3. Once the IRS has validated your identification, you can either **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 from the IRS Web site, you will have to login to open your saved FAFSA.
4. If you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS."
5. See screen example below.

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information

Student Tax Information

ℹ️ ▪ **Attention!** You must provide financial information from your **2016 tax return** on the following pages.

☑️ ▪ Application was successfully saved.

For 2016, have you completed your IRS income tax return or another tax return?

`Already completed ▼`

For 2016, what is your tax filing status according to your tax return?

`Single ▼`

Did you 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`

`⟨ PREVIOUS`　`NEXT ⟩`

`NEED HELP?`　`SAVE`　`CLEAR ALL DATA`　`VIEW FAFSA SUMMARY`　`EXIT`

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 information will be saved and your *FAFSA on the Web* session will end.

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.

Click **OK** to continue. Otherwise, click **Cancel**.

If you have any questions or problems using this tool, view available Help options for assistance.

`CANCEL`　`OK`

Get My Federal Income Tax Information

See our Privacy Notice regarding our request for your personal information.

Enter the following information from your 2016 Federal Income Tax Return. ❓   Required fields *

First Name *	
Last Name *	
Social Security Number *	*** - ** -
Date of Birth *	___ / ___ / ___
Filing Status * ❓	Single ▼
Address - Must match your **2016** Federal Income Tax Return. ❓	
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.

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

IRS.gov

2016 Federal Income Tax Information

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

Tax Year	Type of Return Filed	Untaxed Pensions
Name(s)	Adjusted Gross Income	Untaxed IRA Distributions
Social Security Number	Income Earned from Work	Tax exempt Interest Income
Filing Status	Income Tax	IRA Deductions and Payments
IRS Exemptions	Education Credits	Status of Amended Returns Received

Refer to your tax records if you have a question about the values you reported.

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

Transfer My Tax Information into the FAFSA ❓
☑ The tax information provided to FOTW 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. [Do Not Transfer] ❓

IRS Privacy Policy

ℹ · **You have successfully transferred your 2016 IRS tax information.**

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS." For your protection, IRS tax return information is not displayed on the FAFSA.

What income tax return did you file for 2016?
Transferred from the IRS

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

How much did you earn from working (wages, salaries, tips, etc.) in 2016?
Transferred from the IRS

Did you file an IRS Schedule K-1 (Form 1065) for 2016?
○ Yes ● No

As of today, are you a dislocated worker?
[No ▼]

⟨ PREVIOUS ⟩ ⟨ NEXT ⟩

Why Can't I use the IRS Data Retrieval Tool if I file a tax return outside the U.S.?

If you did not file a Federal IRS tax return, you cannot use the IRS Data Retrieval Tool because there is no information on file with the IRS for you to view and transfer.

If you filed both a Federal IRS tax return and a Puerto Rican or foreign tax return, you will only be able to view and transfer your Federal IRS tax return information if you link to the IRS Web site. Therefore, your IRS tax return information may not completely reflect what you need to report on the FAFSA.

Why can't I use the IRS Data Retrieval Tool if I am married and filed taxes separately from my spouse?

If you are married and filed taxes separately from your spouse, you will only be able to view and transfer your own tax return information if you link to the IRS Web site. Therefore, your IRS tax return information may not completely reflect what you need to report on the FAFSA.