Step By Step Instructions For Using The IRS Data Retrieval Tool

Follow these steps if you did not originally request IRS Data Retrieval transfer to your FAFSA.

**Step 1:** Log into your FAFSA ([www.FAFSA.GOV](http://www.FAFSA.GOV)) and click on “Login”. *Fig 1.1*

**Step 2:** Enter student’s information. *Fig 1.2*

***Since your FAFSA has already been processed and you are going back in to do the IRS Data Retrieval, then once you have entered the student information click on ‘Continue’ button (*Fig 1.2b*). Enter the ‘Password’ (not your PIN) (*Fig 1.2c*) you created, enter it here, if you forgot your password then clock ‘I Forgot My Password’ and an email will be sent to reset it.***
Step 3: Click on the top tap “Financial Information”. You will be prompted to answer, “For 2014, have your parents completed their IRS income tax return or another tax return?”. In the drop down box select the appropriate option. If you selected “Already Completed” it will prompt you to the next section. Otherwise, you are not able to use the IRS Data Retrieval. Fig 1.3

Step 4: If you selected “Already Completed” it will prompt you to answer ‘Yes’ or ‘No’ to a series of questions. Fig 1.4
****If you answered ‘Yes’ to any of the questions above, you will not be able to utilize the IRS Data Retrieval Tool at this time. Otherwise you will be prompted to enter your PIN and click on “LINK TO IRS”.

**Step 5:** Once you click to Link to IRS you will receive a message that you are leaving FAFSA on the Web. Fig 1.6

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**Step 6:** Once on the IRS website, enter the requested information of the person listed Fig 1.7

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**Step 7:** Once the IRS validates your identification, your IRS tax information will display. Click ‘Submit’. You will then be given the option to transfer your information by clicking “Transfer Now” which will then give you the response “You have successfully transferred your 2014 tax information”.

***Click ‘Next” and follow the same Step 3 to Step 7 for the student before going to Step 8***
The data that will be retrieved, if applicable, includes:

- Adjusted gross income
- Taxes paid
- Number of exemptions
- Education credits
- Untaxed portion of IRA distributions and pensions

The following information will not be retrieved and must be manually added to the FAFSA if applicable:

- Earned income (for each father, mother, and/or student): listed in Box 1 on W-2 statements
- Self-employment income (Line 12 or 18 of your tax return. If negative, enter zero)
- Earned income from partnership (Form 1065: Box 14, Code A of Schedule K-1)
- Payments to tax-deferred pensions (Box 12a-d, Codes D, E, F, G, H and S on the W-2)
- Child support received or paid
- Other untaxed income such as Housing Allowance, worker’s compensation, disability, etc.

**Step 8:** You are NOT DONE!!! Be sure once you are done with the IRS Data Retrieval that it takes you back to the FAFSA where you need to complete the sign and submit section by entering your PIN numbers to electronically sign your FAFSA. When you are finished you will receive a confirmation number and an Expected Family Contribution (EFC) number. (Fig 1.8)

Scroll down to enter both student and parent PIN’s, click ‘Agree’ to the Terms of Agreement for both student and parent and click ‘Submit My FAFSA Now’.