FAFSA – IRS Data Retrieval Tool

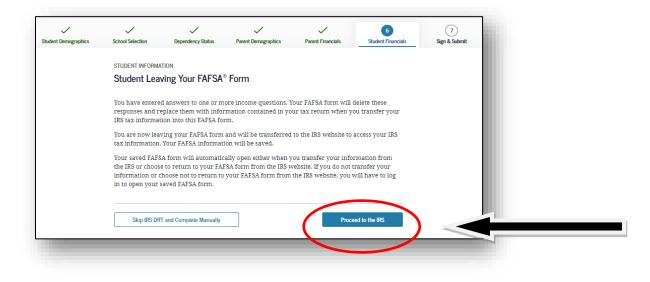
For the 2023-2024 award year, students/parents who indicate they <u>have filed</u> a 2021 Federal Income Tax Return will be directed to use the IRS Data Retrieval Tool to report or update their income information on the FAFSA.

- The IRS Retrieval Tool gives students/parents the ability to transfer their income information directly from the IRS onto the FAFSA.
- When you answer that you have <u>Already Completed</u> your 2021 IRS income tax return, you may be eligible to transfer your tax data onto the FAFSA using the IRS Retrieval Tool. You must also know your tax filing status to use the IRS Retrieval Tool.
- 1) Click "Continue" and there will be a message informing you that you are leaving FAFSA on the Web and being directed to the IRS website.

(Note: If your tax filing status was "Married-Filed Separate Return", or you filed a Puerto Rican or foreign tax return for 2021, the IRS Retrieval Tool will not be available for your use.)

Student Demographics	Image: Constraint of the second sec					
	STUDENT INFORMATION					
	Student Tax Filing Status					
	Application was successfully saved.					
	Because the FAFSA [®] form belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.					
	For 2021, have you completed your IRS income tax return or another tax return?					
	Already completed \sim (3)					
	What income tax return did you file for 2021?					
	IRS Form 1040 ~ 🕅					
	For 2021, what is your tax filing status according to your tax return?					
	Single ~ 🔿					
	RECOMMENDED IRS Data Retrieval Tool Applying is faster and easier if you transfer your tax return information into this FAFSA ⁸ form with the IRS Data Retrieval Tool (DRT)! A For your protection, your tax return information will not display on the IRS website or on the FAFSA ⁸ form.					
	Previous Skip IRS DRT and Complete Manually Proceed to the IRS >					

2) Click "Proceed to the IRS" and "Ok"





- 3) Once you are connected to IRS.gov:
 - a. Enter your address exactly how it looks on your 2021 Federal Income Tax Return
 - b. Click "Submit"

Get My Feo	
Enter the following information from your 2021 Fede	eral Income Tax Retur
All fields are required unless marked otherwise.	
First Name	
DEPENDENT	
Last Name	
DATA43	
Social Security Number	
No input required	Apartment Number
*** - ** - 2542	Required if entered on your tax return
Date of Birth	
MMDDnnnn	Country
01/01/1999	United States
Filing Status 🕐	City, Town or Post Office
Married-Filed Joint Return	
Street Address 🕐	State / U.S. Territory
Must match your 2021 Federal Income Tax Return	Select One
Р.О. Вок 🍞	ZIP Code
Required if entered on your tax return	
	By submitting this information, you certify that you are the person ident result in civil and criminal penalties.
	SUBMIT
	Select the button below to exit the IRS system and return to your FAFS
	CANCEL

- 4) You will be provided a list of all the possible fields from a tax return that could transfer back into the FAFSA form. (Your tax information will be masked for your security)
 - a. Select <u>Transfer My Tax Information into the FAFSA Form</u>
 - b. Select <u>Transfer Now</u>

2021 Federal	Income Tax Informatio	n
Dependent Data43		
	ovided, the Internal Revenue Service (IRS) located sfer your tax information to the U.S. Department of	d your income tax return. With your permission f Education (ED) to populate any applicable FAFSA®
	not display your tax information and will further end display your tax information on your FAFSA form.	crypt any tax information transferred using the IRS
The data retrieved from your tax	return is limited to the items listed below as you re	eported to the IRS:
Tax Year	Type of Return Filed	Untaxed Portion of IRA Distributions &
Name(s)	Adjusted Gross Income	Pensions/Annuities
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
		Schedule 1 Evaluation
	nave a question about the values you reported.	
Transfer My Tax Information in	ě –	
appropriate FAFSA questions.	After the FAFSA questions are populated, you will return to your FAFSA form. Check	TRANSFER NOW ®
Do Not Transfer My Tax Inform	nation and Return to the FAFSA Form 🍞	
	er" button, you are choosing not to transfer ally. Your IRS session will end, and you will	DO NOT TRANSFER

5) Once you have transferred your data, you will be returned to the FAFSA website to complete the remaining questions on the FAFSA.

Student Demographics	School Selection	V Dependency Status	4 Parent Demographics	5 Parent Financials	6 Student Financials	7 Sign & Submit
	STUDENT INFORMA					
	Vou have successfully transferred your 2021 IRS tax information. Your IRS tax information has been successfully transferred into this FAFSA [®] form. 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 form.					
	What was your adjusted gross income for 2021? Transferred from the IRS					
	Previous				Continue	