

# **How to Transfer Your IRS Tax Information Directly into Your FAFSA during the initial application process.**

The IRS Data Retrieval tool will appear in the “Financial Information” section of the FAFSA. You will be asked the following questions to determine if you can use the retrieval tool:

1. If you are married, did you file Married Filing Separately?
2. If you are married, did you file Head of Household?
3. Did you file an amended return?
4. Did you file a Puerto Rican or foreign return?
5. Did you recently file your taxes?

If you answer yes to any of the above, you will not be able to use the retrieval tool. If you recently filed your taxes (electronically), you must wait 2 to 3 weeks before you will be able to link. If you mailed your tax return, you must wait 6 to 8 weeks before you can link.

If you answer “none of the above”, you will be given the option to link to the IRS. Follow the instructions below.

1. Enter your PIN and click **Link to IRS**.
2. Your FAFSA will be saved and you will be transferred to the IRS Web site.
3. On the IRS Web site, enter the requested information (exactly as it is on your tax return, errors will cause your information to be rejected) and click submit.
4. Once the IRS has validated your identification, your IRS tax information will display. 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. Remember, if you choose not to use the IRS Data Retrieval process, you may be required to send in an IRS Tax Transcript (schools can no longer accept Federal Tax returns).
5. If you transfer your IRS tax information, questions that are populated with tax information will be marked with “Transferred from the IRS.” **DO NOT CHANGE ANY TRANSFERRED INFORMATION, DOING SO WILL INVALIDATE YOUR TAX INFORMATION.**

**IF YOU ARE UNABLE TO USE THE IRS DATA RETRIEVAL TOOL WHEN YOU FIRST FILE YOUR FAFSA, FOLLOW THE INSTRUCTIONS ON THE BACK FOR USING IT LATER.**