2016-2017 IRS Data Retrieval Tool Guide

Use this guide to transfer tax information to your FAFSA

PLEASE NOTE: The IRS Data Retrieval Tool will be available within 2-3 weeks of electronically filing the 2015 IRS Income Tax Return or within 8-11 weeks of filing a paper return. If you are unable to use the IRS Data Retrieval Tool you must obtain a federal tax transcript. For information on obtaining a tax transcript visit http://financialaid.umd.edu/applying/tax_return_transcript.php.

1. Access your FAFSA at www.fafsa.ed.gov

2. Once logged in click on “Make Corrections to a Processed FAFSA” (if you have previously submitted your FAFSA).

3. On the menu at the top, click on “Financial Information”
4. Read and check any boxes that might apply to your situation to see if you qualify to use the tool. You must indicate that your tax return has already been completed otherwise the filter questions will not be viewable. Review and respond to the statements. If you are able to check “None of the above,” you should be able to use the IRS Data Retrieval Tool. Click the “Link to IRS” button to be redirected to the IRS website and transfer your current tax information into your FAFSA.

5. Select “OK” to be redirected to the IRS website.
6. Fill in the appropriate information and click “Submit.” Make sure that the address you put into this form, matches the address used on your 2015 Federal Income Tax Return. If you have questions for the IRS you can contact them at 1-800-829-1040 or visit irs.gov.

7. The Federal Income Tax Return information which will be transferred will appear on a new screen. Review the information and check the box next to “Transfer My Tax Information into the FAFSA” and click “Transfer Now.”
8. Note the answers to FAFSA questions that state “Transferred from the IRS”.

9. Continue to the “Sign and Submit” tab. Enter your (and your parent's, if dependent) PIN number and click “Sign”. Then agree to the Terms of Agreement and click “Submit My FAFSA”.

Congratulations! You’re done!