

2020-2021 IRS Data Retrieval Tool Instructions

The IRS Data Retrieval Tool should be used to verify tax information through the FAFSA.

1. To begin, go to fafsa.gov.
2. Log in using the student's FSA ID and password or enter the student's name, date of birth, and Social Security Number.
3. If the FAFSA has previously been submitted, click **Make FAFSA Corrections**.
4. In the **Financial Information** section, select **Already Completed** if the parent's 2018 IRS income tax return has already been completed and enter your **Tax Filing Status** as listed on your tax form.
5. Answer the question that asks if you filed a foreign tax return. If **No** is selected, click **Link to IRS** and enter the parent's FSA ID and password. Then click **Proceed to IRS Site**.
6. Enter all requested information exactly as it appears on the 2018 IRS income tax return and click **Submit**.
7. Check the box for **Transfer My Tax Information into the FAFSA Form** and then click **Transfer Now**.
8. You will be redirected back to the FAFSA. You will know that your tax information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA form. *
9. Repeat these steps for the student if the student also filed a 2018 IRS income tax return.
10. Provide electronic signatures when prompted. Agree to terms and then click on **SUBMIT MY FAFSA NOW** (a confirmation page will then appear).

If you are unable to use the IRS Data Retrieval Tool, you will need to either:

- Provide a 2018 Tax Return Transcript from the IRS. This can be requested online at www.irs.gov (click on Get Your Tax Record); by calling the IRS at 1-800-908-9946; or by completing IRS Form 4506-T. OR
- Provide a signed copy of your 2018 Federal Tax Return including Schedules 1, 2, and 3 (if applicable).

Please contact the Financial Services Office at 312-461-0600 with any questions.

**Please note, for your protection, your tax information will not be displayed on either the IRS site or fafsa.gov.*