

2023-2024 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.
3. If the FAFSA has been submitted previously, click **Make Corrections to my FAFSA Form**.
4. In the **Parent Financials** section, select **Already Completed** if the parent's 2021 federal income tax return has already been completed and enter the **Type of Tax Return Filed** (Ex. Form 1040) and the **Tax Filing Status** (Ex. Married Filed Jointly) as listed on the 2021 federal income tax return.



5. Click **Proceed to the IRS**. Provide parent's FSA ID and password.
6. Enter all requested information exactly as it appears on the 2021 federal income tax return (using the same capital letters, abbreviations, and punctuation) 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 tax information on your FAFSA form.
9. Repeat these steps in the **Student Financials** section if the student also filed a 2021 federal income tax return.
10. Provide electronic signatures when prompted. Agree to terms and then click on **Sign This FAFSA Form**. Continue and click on **Submit my FAFSA Form Now**. You will receive a confirmation page once you have completed submission.

FAFSA TIP: Click the  button next to any FAFSA question and additional help text will be displayed.

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

- Provide a 2021 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.
- Provide a signed copy of your 2021 federal income tax return including Schedules 1, 2, and 3 (if applicable).

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