

HOW TO LINK 2020 FEDERAL TAX INFORMATION TO THE 2022-2023 FAFSA

1. The Financial Section of the FAFSA will request information on your 2020 Federal Tax Information. If you did not file a Puerto Rico tax return, you should be able to utilize this option.

RECOMMENDED
IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA® form with the IRS Data Retrieval Tool (DRT)!

For your protection, your tax return information will not display on the IRS website or on the FAFSA® form.

Previous Skip IRS DRT and Complete Manually **Proceed to the IRS >**

2. You will be prompted to leave the FAFSA website and enter the IRS website.

School Selection ✓ Dependency Status ✓ Parent Demographics 4 Parent Financials 5 **Student Financials 6**

STUDENT INFORMATION
Student Leaving Your FAFSA® Form

You have entered answers to one or more income questions. Your FAFSA form will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA form.

You are now leaving your FAFSA form and will be transferred to the IRS website to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA form will automatically open either when you transfer your information from the IRS or choose to return to your FAFSA form from the IRS website. If you do not transfer your information or choose not to return to your FAFSA form from the IRS website, you will have to log in to open your saved FAFSA form.

Skip IRS DRT and Complete Manually **Proceed to the IRS**

Close x

You are now leaving this page. Select "OK" to continue or select "Cancel" to stay on this page. Your FAFSA information will be saved if you choose to continue.

Cancel **OK**

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY! Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

OK

- You will be sent to the IRS website, and asked to enter in your identifying information to find your taxes.

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2020 Federal Income Tax Return. [?](#)

All fields are required unless marked otherwise.

First Name

Last Name

Social Security Number

When successful, you'll be directed to a confirmation page that will ask if you want to transfer the information. Click the box next to "Transfer My Tax Information into the FAFSA Form" and then the button "Transfer Now."

2020 Federal Income Tax Information

Aaron W & Kelly A Zellmer

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

Tax Year	Type of Return Filed	Untaxed Portion of IRA Distributions & Pensions/Annuities
Name(s)	Adjusted Gross Income	Tax-exempt Interest Income
Social Security Number	Income Earned from Work	IRA Deductions and Payments
Filing Status	Income Tax	Status of Amended Returns Received
IRS Exemptions	Education Credits	Schedule 1 Evaluation

Refer to your tax records if you have a question about the values you reported.

Transfer My Tax Information into the FAFSA Form [?](#)

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.

TRANSFER NOW [?](#)

Do Not Transfer My Tax Information and Return to the FAFSA Form [?](#)

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end, and you will return to your FAFSA form.

DO NOT TRANSFER [?](#)


- Once transferred, you'll be brought back to the FAFSA website. You will not be able to view the information transferred, but you will see that the information was successfully added to the FAFSA.

Continue to the Sign & Submit page. The FAFSA will be completed when you've reached the Confirmation page.




STUDENT INFORMATION

Student IRS Info

 **You have successfully transferred your 2020 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 and your spouse's adjusted gross income for 2020?

Transferred from the IRS 

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[Continue](#)

NOTE: If you are using the IRS Data Retrieval Tool for both the student and parent you will have to complete this process twice, once under the Student Financial Information Section and once under the Parent Financial Information section before submitting the FAFSA.

IF YOU HAVE QUESTIONS AS YOU'RE COMPLETING YOUR FAFSA PLEASE CALL 1-800-4-FED-AID