IRS DATA RETRIEVAL INSTRUCTIONS

The IRS Data Retrieval Tool will be available three weeks after electronically filing your tax return. Here are a few easy steps to update your FAFSA with the IRS Data Retrieval Tool:

Logon to the FAFSA Website—www.fafsa.gov
- Select the “Login” button
- Log in using the student’s name, date of birth, and social security number and click “Next”
- Click on “Make FAFSA Corrections”
- Enter the student’s PIN, create a transaction password, and click “Next”
- Select the "Financial Information" tab from the top of the page

To update the parent tax information with the IRS Data Retrieval Tool:
- Go to the "Parent Financial Information" page
- Make sure the status of the tax return is marked as “Already Completed”
- Answer the questions in the box to see if you are eligible to use the IRS Data Retrieval Tool
- If eligible, select which parent is providing information on the FAFSA
- Enter the PIN for the parent providing the information
- Click "Link to IRS" to be transferred to the IRS database
- Fill in all required fields and click “Submit”
- Review the tax information displayed, check the “Transfer My Information into the FAFSA” box and click the “Submit” button. Please do not change any of the items after bringing your data into the FAFSA form.

To update the student tax information with the IRS Data Retrieval Tool:
- Go to the "Student Financial Information" page
- Make sure the status of the tax return is marked as “Already Completed”
- Answer the questions in the box to see if you are eligible to use the IRS Data Retrieval Tool
- If eligible, click "Link to IRS" to be transferred to the IRS database
- Fill in all required fields and click “Submit”
- Review the tax information displayed, check the “Transfer My Information into the FAFSA” box and click the “Submit” button. Please do not change any of the items after bringing your data into the FAFSA form.

Circumstances ineligible for IRS Data Retrieval
- Not required to file taxes or not able to retrieve information from the IRS
- Married filing separate or domestic partners will not be able to use the IRS Data Retrieval Tool
- Recent change in marital status on taxes different than current status
- Parent/Student address on the tax form must match the FAFSA form exactly
  Example – Address on Tax Form is 2500 E Highland
  FAFSA form address is 2500 East Highland Road
  This discrepancy might not allow you to import your tax information

Proceed to the Sign & Submit section of the FAFSA to finalize the submission of your FAFSA corrections.

IRS TAX RETURN TRANSCRIPT

If you are unable to use the IRS Data Retrieval Tool and need to request your IRS Tax Return Transcript, you can request a copy at www.irs.gov, order by phone at 1-800-908-9946, or visit your local IRS office.