2016-2017 - IRS Data Retrieval Tool for FAFSA

Data is available within 1-2 weeks of electronically filing your taxes or 6-8 weeks of filing a paper tax return. These instructions assume you have already filed your 2016-2017 FAFSA and have waited the appropriate length of time to access the tax information.

Step 1: Go to www.fafsa.gov and click "Login."

Step 2: Enter your FSA Username and Password and click "Next."

Step 3: Click "Make FAFSA Corrections."

Step 4: Create a Save Key and click "Next."

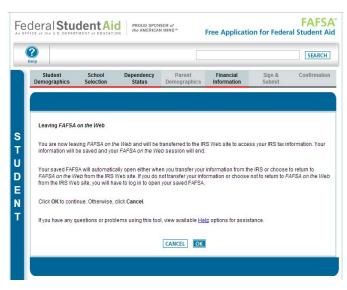
Step 5: Click on the "Financial Information" tab.
Select "Already Completed" for the tax return filing status and answer the eligibility questions.



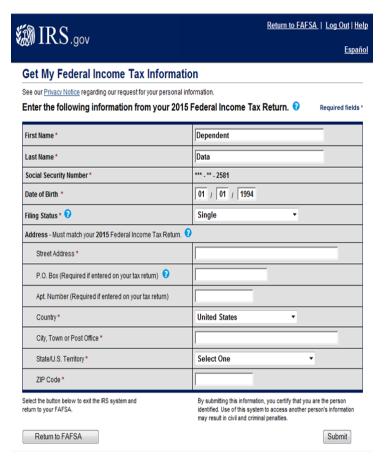
Step 6: If you are eligible to use the IRS Data Retrieval Tool, you can now click on the LINK TO IRS button. (If you are not eligible to use the IRS Data Retrieval Tool follow, please proceed to section 2 of these instructions to obtain a Tax Transcript.

Step 7: Click "OK" to leave the FAFSA website and enter the IRS Data Retrieval Tool website.

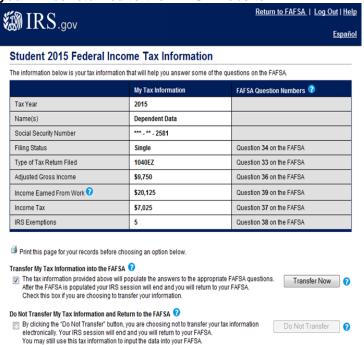
Step 8: Click "OK" to accept the IRS Data Retrieval Tool terms of use.



Step 9: Enter the requested information and click "Submit." Remember to enter your address *exactly* as it you filed your taxes.



Step 10: Review the information that the IRS has retrieved from your tax returns. Check the box to "Transfer My Tax Information into the FAFSA" and click "Transfer Now." Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.



Step 11: Do not update any answers that say "Transferred from the IRS" or your school may require you to supply additional documentation. Answer the additional questions and click "Next."

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.

Step 12: Continue to the "Sign & Submit" tab. Follow all of the instructions carefully to submit your FAFSA correction.

Remember to print or save the confirmation page for your records.



If you have filed an amended return, you are required to submit your signed 1040X form. You will also need to submit your tax return transcript **and** account transcript to the Financial Aid office. You cannot use the online Data Retrieval Tool.

How to obtain a Return Transcript from the IRS

Get Transcript by Mail:

- 1. Go to www.irs.gov
- 2. Under "Tool," click "Get a tax transcript."
- 3. Click "Get Transcript by mail" to order your Transcript



- 4. Click "Ok"
- 5. Enter requested information exactly as it appears on your tax return and click "Continue."
- **6.** Select "Return Transcript" and the correct year. We are unable to use and Account Transcript for Verification purposes.
- 7. Click Continue. You're done! Your transcript will be mailed within 5 to 10 business days.