

IRS Data Retrieval Tool for FAFSA

The step by step instructions assume that you have already submitted a FAFSA and is meant to help you update your FAFSA using the online IRS Data Retrieval Tool.

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

Step 2: Enter your student information and click "Next."

Step 3: Click "Make FAFSA Corrections."

Step 4: Enter your Federal Student Aid FSA ID, formerly PIN. If you don't know or can't remember your identification information, click and follow the directions on the website.

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 will be prompted to enter your FSA ID information and click "LINK TO IRS." If you are not eligible to use the IRS Data Retrieval Tool, follow the instructions on the back of this page to order a tax return 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 appeared when 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 question(s) asking how much was earned in wages, salaries, and tips and click "Next."

Step 12: Continue to the "Sign & Submit" tab. Agree to the Terms of Agreement, click "Sign", then click "Submit My FAFSA Now."

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

Request IRS Tax Return Transcript by Mail

1. Go to www.irs.gov/Individuals/Get-Transcript & select "Get Transcript by Mail"
2. Click **OK** when prompted with the user agreement.
3. Enter your social security number, date of birth, street address, zip code, and then **click Continue**—do **NOT** press enter as it will return you to the first screen. (If you filed "married, jointly" the social security number and date of birth to enter is that of the first person listed on the tax return.)
4. Select the **Type of Transcript** and the appropriate **Tax Year** and click **Continue**.
5. The following message should be displayed: "We have accepted your request for a 20XX **Return Transcript**. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you. If you need more than one copy of your transcript you are allowed to make copies for your personal records."

OR you may use the IRS automated phone request directions below.

Telephone Request

- The Tax Return Transcript is available from the IRS by calling 1-800-908-9946.
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select "**Option 2**" to request an IRS Tax Return Transcript and then enter the correct tax year. Example, 2014.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within **5 to 10 days** from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.