

IRS Data Retrieval Instructions for Independent Students

The IRS Data Retrieval Tool allows students to access their IRS tax return information needed to complete or verify information on the FAFSA. Students may transfer data directly into their FAFSA.

Some filing statuses are not eligible to use the IRS Data Retrieval tool and will need to contact the IRS to request a free **Tax Return Transcript** at (800) 908-9946 or by downloading an electronic copy at www.irs.gov/Individuals/Get-Transcript.

- www.fafsa.ed.gov.
- Click on “Login”.
- Log in by entering your (the student’s) FSA ID.
- Click on “Make FAFSA Corrections” (in small blue type).
- Create a save key and re-enter the save key.
- Click on light blue “Financial Information” tab towards top of the page.
- In the first box, select “Already Completed” for the completion question if the taxes are finalized
- Answer the questions prompted. If you are not able to answer “no” you are not able to use the Data Retrieval Tool.
- Click on blue “Link to IRS”.
- You will leave FAFSA on the Web and be transferred to the IRS web site, click “ok”.
- Click “ok” again.
- Choose the correct filing status from the drop down menu and enter the address from the tax return.
- Click on “Submit”.
- Click the first box to request the transfer of information and then click on “Transfer Now”.
- You will now be back on the FAFSA website.
- Scroll to bottom of page and click “Next”.
- Scroll to bottom of page and click “Next” again.
- Enter FSA ID and click the “Sign” button for both.
- Click “Agree”.
- Click on Submit my FAFSA Now.
- You will see a Confirmation Page if the submission was successful. Financial Aid should receive your update within five business days if completed correctly.