DIRECTIONS ON HOW TO COMPLETE THE IRS DATA RETRIEVAL PROCESS FOR PARENTS AND STUDENTS

The Office of Federal Student Aid and the Internal Revenue Service have worked together to develop a process to simplify the steps that families must take each year to complete the Free Application for Federal Student Aid ("FAFSA").

The benefit (to families) of utilizing the IRS Data Retrieval Process is that it will greatly simplify and expedite the verification process. You will NO LONGER have to submit complete copies of your federal tax returns to our office before we can finalize your federal aid eligibility.

- You will first need to log into www.FAFSA.gov with your pin number. (Your pin will be the same one that was given to you when you first filed your FAFSA.) Select the option “Make FAFSA corrections.”

- There will be an introduction page with some informational links, click NEXT to begin the correction process.

- Choose the “Financial Information” tab to access the Data Retrieval Tool. (You can click NEXT or PREVIOUS to navigate through your FAFSA.)

- There will be a drop down menu asking if you have completed your IRS income tax return; if you select “Already Completed,” you will be presented with a number of questions to determine if you are eligible to use the Data Retrieval Tool. If you answer “None of the above,” you will be presented with the option to enter your PIN and link to the IRS. (If you do not answer “None of the above” then you need to contact the IRS to order a tax return transcript).

- You will see a page telling you that you are leaving the FAFSA on the Web. Clicking OK will take you to the IRS website, where you will need to authenticate your identity before any personal information is displayed. (The information entered must be identical to the information that was filed on your 1040 with the IRS.)

- If the IRS is able to authenticate your identity, your IRS tax information will display. After viewing your tax data, you will have the option to transfer the tax information directly to the FAFSA application using the “Transfer Now” button; click OK to return to the FAFSA.
After returning to the FAFSA, continue to the sign and submit section to submit your corrections.

If you make changes to the information after it is transferred, you will also be required to submit a tax return transcript.

Some families WILL NOT be able to use this tool

- A married independent applicant and spouse who filed separate tax returns;
- When the parents of a dependent student filed separate tax returns;
- An applicant or applicant's parent who have had a change in marital status after the end of the tax year (last day in December);
- The applicant, or parent or spouse, as applicable, who have filed an amended tax return;
- The applicant or the applicant's parent and or spouse, as applicable, have an unpaid federal tax liability

IMPORTANT NOTE: The FAFSA on the Web IRS Data Retrieval Process will only transfer information from an original tax return and not from an amended tax return. Similarly, the IRS Tax Return Transcript only includes information from the original tax return. While the IRS Tax Account Transcript, does include tax return items that were changed when an amended return was filed, it does not include all of the data that did not change. Therefore, both an IRS Tax Return Transcript and an IRS 1040X form must be obtained and submitted to the school for verification to be completed when an amended return was filed.

- Request a Transcript

In summary, when the school is aware that the student or the student’s parent(s) or spouse, filed, or will file, an amended tax return with the IRS, it may obtain from the applicant both an IRS Tax Return Transcript and an IRS 1040X form and use the information from both transcripts to complete verification.