Office of Financial Aid Planning
IRS DATA RETRIEVAL INSTRUCTIONS

You can have your IRS Tax information imported into the FAFSA by using “IRS Data Retrieval.

1. **POINT** your web browser to [http://www.fafsa.ed.gov](http://www.fafsa.ed.gov)
2. **CLICK on “Start Here”**
   - You must enter your first name, last name, SSN, and your date of birth.
   - Click “Next”

3. **Select the “2016-2017” tab**
4. **Scroll down and select “Make FAFSA Corrections”**
   - You must enter your FSA ID and Password
   - You must **create a temporary Password**. This password will be deleted when you hit “submit”.
   - Click “Next”

5. **Select “Financial Information” from the bar across the top.**
   - The “IRS Data Retrieval” screen appears
   - Select “Already Completed” from the drop down menu
   - Five Yes/No questions will be asked. If you answer “Yes” to any of these then you will need to request an IRS Tax Transcript. The instructions are below.
   - If Dependent, select your parent and enter his or her FSA ID.
   - If Independent, enter your FSA ID.
   - Click on “Link to IRS”.
6. **A page will come up warning that you are about to leave the FAFSA website. Continue to the next page.**
7. **Follow the on-screen instructions.**
8. **If you are told that your IRS Tax information is not available, you will have to order a Tax Transcript.**
9. **If your data is available you will be asked to verify some information.**
   - Confirm your name, Select your TAX Filing status, Enter the address you used on your taxes
   - Click “Submit”
   - A screen should appear telling you what information will transfer into your FAFSA, review this.
   - Select the check box for “Transfer my Tax Information into my FAFSA”.
   - Click on “Transfer Now”
10. **The information will update the FAFSA and you will be returned to the FASFA website.**
    - Review your changes, select “Next” when ready.
    - If you are a “Dependent” student you will need to complete steps 5-9 for both the student and a parent.
11. **You will be at the “Sign and Submit” section.**
    - Enter your ID and select “Agree”, click on “Sign”
    - Repeat this step for each person whose information you are updating: Mother, Father, etc...
    - **Select “Submit my FAFSA now”**
12. **You will get a confirmation page. Print or Save this for your records.**
    - Select “Exit” at the bottom of the page.
    - Select “Logout” at the top of the page.
13. **Your updated information will be sent to the financial aid office.**
14. **Complete the Verification Worksheet if you have not already done so.**

**MATCH UNSUCCESSFUL?**
- If you receive notification that there was no match in the IRS database you should double check your filing status and address you provided to make sure they match your taxes.
- You may want to re-attempt this process a week later, as it may be a timing issue.