

### IRS Data Retrieval Tool Instructions

1. Go to [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
2. Click the **LOGIN** button
3. Enter the student's first name, last name, students SSN, students Date of birth and click **NEXT**
4. Click **MAKE FAFSA CORRECTIONS**
5. Enter the FSA ID and create a temporary password for this correction and click **NEXT**
6. Click **FINANCIAL INFORMATION** tab at the top
7. Answer the following questions:
  - **For 2017, have you completed your IRS income tax return or another tax return?** (Once you have completed your Tax return and submitted it you should answer "AlreadyCompleted")
  - **For 2017, what is your tax filing status according to your tax return?** (Your tax filing status helps to determine if you can use the data retrieval tool).
  - **Did you file a Puerto Rican or foreign tax return?** **NO** will prompt the next question (If you answer **YES** you may not proceed with the IRS data retrieval-you should request a tax transcript by calling 1-800-908-9946)
8. Click "**PROCEED TO IRS SITE**"
  - a. The page will read: "**Leaving FAFSA on the Web**" read the information and click **OK**.
  - b. Enter FSA ID & password
  - c. Click "**Proceed to IRS website**"
9. Fill in the information exactly as it appears on your tax return.
10. Click **SUBMIT**. Once it is submitted you will get an error message **OR** the list of information that is going to be transferred to the FAFSA
11. Click in the box under "**Transfer My Tax Information into the FAFSA**"
12. Click **TRANSFER NOW**
13. You will now be back on the FAFSA website and there should be a message that reads "**You have successfully transferred your 2017 IRS tax information**"
14. **YOU ARE NOT DONE YET!**
15. Answer the question, "**As of today, are you a dislocated worker?**"
16. Scroll all the way down and click **NEXT**
17. You will see the changes made to the FAFSA, scroll all the way down and click **NEXT**
18. Enter the student and parent FSA ID, agree to the terms, click sign and **submit** FAFSA.
19. Now you should be done with the IRS data retrieval. You will receive a confirmation page once the process is complete.

### **SOME OTHER OPTIONS ARE:**

- **You may also order your tax return transcript by calling 1.800.908.9946.**
- **Download and print your IRS tax return transcript immediately from the IRS website.** You can now order your transcript(s) using a new online application [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript). The application allows you to view and print your transcript(s) immediately.

**If you would like to order a copy by mail, complete the new Short Form Request for Individual Tax Return Transcripts (Form 4506T-EZ).** This streamlined form will help you get your return information quickly and easily