IRS Data Retrieval Instructions

As part of the verification process you are required to submit 2015 tax information for you and your spouse (if applicable) as well as your parent(s) (if a dependent student). There are two ways to do this:

**OPTION 1. IRS DATA Retrieval – preferred method**

The IRS Data Retrieval tool allows FAFSA applicants and their parent(s) to retrieve and transfer their tax data directly from the IRS into their FAFSA application. Data Retrieval is available for tax filers expecting IRS refunds starting 2-3 weeks after e-filing or 6-8 weeks after filing a paper return with the IRS. If money is owed to the IRS, data retrieval on e-filed returns is available by the end of June or 3-4 weeks after the IRS receives the full/final payment. Data retrieval is available for paper return filers with a balance owed by the end of July.

If you or your parent(s) are/is a non-tax filer, a non-filing statement and W-2 forms (if applicable) are required. Read the FAFSA screens carefully, but the following steps will guide you.

Step # 1 - Go to www.fafsa.gov.
Step # 2 - Login with the student’s name, Social Security #, date of birth and/or his/her FSA I.D.
Step # 3 - Click on “Make Correction,” enter the student’s FSA I.D., and select a Save Key (password)
Step # 4 -
  - Click on the “Financial Information” heading.
  - Select “Already Completed” when asked about completing your 2015 tax return
  - Respond to filtering questions.
  - If all questions are answered “no”, then the “Link to IRS” button will be available to select (a parent of a dependent student must enter his/her FSA I.D. at this time).
  - Enter the address and tax filing status exactly as it appears on your 2015 paper tax return. Click on “Submit.”
  - Review the summary of your/parent’s tax information, and then select “Transfer my Tax Information into the FAFSA”. Click on “Transfer Now”.
  - Expect a message confirming the information transferred. DO NOT change any of the transferred information; changing IRS transferred data will void a valid IRS transfer.
  - Dependent students should repeat the above steps to transfer their own tax data.
Step # 5 – Review changes, SIGN electronically and SUBMIT

**OPTION 2. TAX TRANSCRIPTS- optional method**

If you/spouse or your parent(s) is/are not eligible to use the IRS Data Retrieval Tool, official tax RETURN transcripts must be submitted. Here are three ways to request a tax transcript:


Select ‘Get Transcript by MAIL’. Make sure to request a “RETURN TRANSCRIPT” from the drop down menu. We cannot accept “account transcripts”.

2) Call (800) 908-9946 to order a transcript by following the prompts.

3) Complete and mail in IRS form 4506T-EZ or 4506-T. These forms can be found at [www.irs.gov](http://www.irs.gov).

**Some Families Will Not Be Able to Use the IRS Data Retrieval Tool:**

- If the married parents of a dependent student filed separate tax returns;
- When the dependent student's legal parents are unmarried but living together;
- If an applicant or an applicant's parent had a change in marital status after the end of the tax year;
- If anyone filed an amended tax return (1040X); *(Tax return transcript and signed 1040X form required instead)*
- If the student/parent was an IRS Identity Theft victim. Call 1-800-908-4490 for a special TRDBV transcript that can be used to meet this financial aid verification requirement.