

How to Use IRS Data Retrieval

Once you have completed your taxes, wait the appropriate length of time (two weeks if filed electronically and 8 weeks if by mail) and follow these steps:

If Just Completing FAFSA:

1. Log into www.fafsa.ed.gov
2. In Financial Section answer questions about your tax filing
3. If you are eligible to use the IRS Data Retrieval Process, click on the Link to IRS link and click OK. (See below**)
4. On the IRS Web site, enter the requested information and click submit.
5. Click the box under the “Transfer My Tax Information into the FAFSA” and then click Transfer Now
6. You should then receive a message “You have successfully transferred your 2013 tax information”.
7. Be sure to finish going through all the steps and electronically sign (if dependent student one of your parents also needs to electronically sign) and submit your FAFSA. You are not finished until you have successfully submitted your FAFSA and received a confirmation number.

If FAFSA is Completed and Going Back in to Use IRS Retrieval:

1. Log back into www.fafsa.ed.gov.
2. Click on Make FAFSA Corrections.
3. Click on Financial Information tab.
4. Change from “Will File” to “Already Completed”.
5. If you are eligible to use the IRS Data Retrieval Process, click on the Link to IRS link and click OK. (See below**)
6. On the IRS Web site, enter the requested information and click submit.
7. Click the box under the “Transfer My Tax Information into the FAFSA” and then click Transfer Now
8. You should then receive a message “You have successfully transferred your 2013 tax information”.
9. Be sure to finish going through all the steps and electronically sign (if dependent student one of your parents also needs to electronically sign) and submit your FAFSA. You are not finished until you have successfully submitted your FAFSA and received a confirmation number.

*****There are a few situations in which you are unable to use the IRS Data Retrieval Process. In these cases, if you are selected for verification, you will need to submit an IRS Tax transcript. *****

- *Married and filing separately – submit transcript for each spouse*
- *Filed an amended tax return*
- *Filing a Puerto Rican or foreign tax return*
- *Had a recent change in marital status*