2016-2017 Instructions for using the IRS Data Retrieval Tool

The federal verification process is to confirm that the income information reported on the Free Application for Federal Student Aid(FAFSA) is accurate.

PLEASE NOTE: The IRS Data Retrieval Tool will be available within 2-3 weeks of electronically filing the 2015 IRS Income Tax Return or within 6-8 weeks of filing a paper return.

Follow the below steps to utilize the IRS Data Retrieval to transfer student and/or parent(s) tax data into the FAFSA:
1. Log-in to your FASFA at www.fafsa.ed.gov.
2. Once logged in click on **"Make Corrections to a Processed FASFA"** if the FAFSA has previously been submitted
3. Enter all required information. The IRS Data Retrieval tool will appear at the **"Financial Information"** section of the FASFA

4. You will be prompted to answer "For 2015, have your parents (if dependent) completed their IRS income tax return or another tax return?" There is a drop down box that will allow you to pick one of three options: will file, not going to file and already completed. If student filed a 2015 tax return you must go to student section and complete this same process.

   Select **"Already completed and your filing status according to your 2015 tax return."** This will prompt the following questions:
   Examples:

If student

and/or parent(s) check **"YES"** to any of the above responses, you must request a 2015 *Tax Transcript* from the IRS. You can do so by going online at www.IRS.gov, or by telephone at 1-800-908-9946.
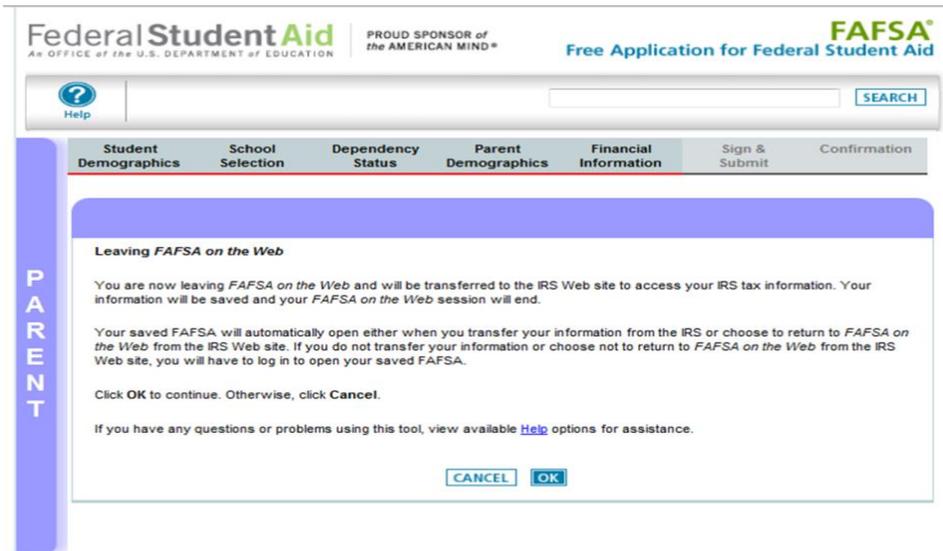
Reasons why the IRS Data Retrieval Tool may not be available:

*Your filing status is Married, Filing Separately (if married)

*Your filing status is Head of Household (if married)

*You filed an amended return

*You filed a foreign tax return

*You was a victim of IRS identity theft (contact your school's Office of Financial Aid)

*If you owe taxes after completing your 2015 tax return

PLEASE NOTE: If parents are married and filed married filing separate, both parents need to request their 2014 tax transcript from the IRS.

If you check **"NO"** to all the responses then you should be able to use the IRS Data Retrieval Tool.

Your FASFA will then be saved and site exit message will display: Click OK.

5. On the IRS website, enter all requested information. Please make sure you enter your 2015 filing status as shown on your tax return.

Ensure that all information entered exactly matches the information recorded on your tax return. This process is case sensitive. Once the IRS validates your identification your IRS tax information will display. You will then be given the option to transfer your information or return to the FASFA where you will be asked to manually enter your information. Also, if dependent and student filed a 2015 tax return, student will need to link his/her income information by using the Data Retrieval tool.

6. After clicking **Transfer Now** you will get a response that reads "You have successfully transferred your 2015 tax return information."   ***Important!!! Please do not change any IRS transferred data.**

You are NOT DONE YET!! Be sure to continue on to the signature page and electronically sign your FAFSA with your FSA password. If you are not requested to sign with your password, read and agree with the terms then submit the application. You are not finished until you have received a confirmation number and Expected Family Contribution (EFC) number. To complete verification you must also submit a signed copy of the verification worksheet.