

# Data Retrieval Tool Instructions

Here are the steps to make the correction to your submitted FAFSA to update with the IRS Data Retrieval:

- Go to [www.fafsa.gov](http://www.fafsa.gov)
- Click on "Login"
- "I am the student" OR "I am a parent, preparer, or student from a Freely Associated State"
- If you are the student, use your FSA ID username, email address or mobile number as well as your FSA ID password-click "Next"
- If you are the parent, enter student's first and last name, Social Security number and date of birth-click "Next"
- Click "**Make FAFSA Corrections**"
- Navigate to the "Financial Information" section of the FAFSA.
- Update the filing status of your parents IRS income tax return. Make sure "Already completed" is selected—click "Next"
- You will be presented with a series of questions that will determine your eligibility to use the Data Retrieval Tool. Once you are presented with the option to enter your FSA ID and "Link to IRS" complete the information and click "Link to IRS". You will then be directed to the IRS website.
- Once on the IRS website, enter the requested information as it appears on your tax return. If the IRS is able to validate your identification your tax information will be displayed. Select "Transfer My Tax Information into the FAFSA"—Click on "Transfer Now"
- You will be re-directed back to FAFSA.
- **When completed proceed to the Sign and Submit section of FAFSA and submit your corrections "SUBMIT MY FAFSA NOW"**

## Tax Return Transcript from the IRS

If your FAFSA is selected for verification, and you did not use the IRS Data Retrieval option or you changed the IRS data, you will be required to request a tax return transcript from IRS and submit it to the Financial Aid Office.

### ONLINE:

- Go to [WWW.IRS.GOV](http://WWW.IRS.GOV)
- Select **Get Your Tax Record-You will have 2 options**
- Click "Get Transcript by Mail"
- Enter Social Security Number, Date of Birth, Street Address, Zip Code. Select Continue
- Type of Transcript = **Return Transcript.**
- For Tax Year = **2019**
- Click on Submit (Your transcript will arrive in 5 -10 business days.)
- Click "Get Transcript Online"
- Log In OR Sign up for an account
- Select a reason you need a transcript: **Higher Education/Student Aid**
- **No Customer File Number needed**
- Click "**GO**"
- Select the year of the Return Transcript needed: **2019**
- Your transcript is ready to download!

### BY PHONE:

- Call the IRS at 1-800-908-9946
- Enter your social security number
- Enter street address numbers
- Option 2 (Tax Return Transcript)
- Enter year: **2019**
- **No Customer File Number needed**
- Your transcript will arrive in 5-10 business days.

### BY MAIL:

- Complete Form 4506-T (Request for Transcript of Tax Return)
- Form 4506-T is available online at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Mail to the address indicated on the form