



IRS Data Retrieval or Tax Return Transcript – Instructions for Parents or Students

Note: For Verification purposes, you can choose either Data Retrieval OR Tax Return Transcript.

IRS Data Retrieval Tool Instructions: (Preferred- faster with more detailed instructions)

Starting Oct. 1, 2017, Federal Student Aid has added security and privacy protections to the FAFSA tool. (The IRS turned off the tool last spring following concerns that data from the tool could be used by identity thieves to file fraudulent tax returns). If you use this tool, tax return information will be encrypted and will not be displayed on the web page or on your FAFSA. Instead, you'll see "Transferred from the IRS," in the appropriate fields.

- Go to www.fafsa.gov
- Click on Login under Returning User
- Use FSA ID as requested
- Select Make Correction to FAFSA
- Click on Financial Information tab
- Answer questions to see if you are eligible to use the IRS Data Retrieval Tool.
- Enter Parent FSA ID for Parent info and/or Student FSA ID for Student info and click on Link to IRS
- The next screen will inform you that you are leaving *FAFSA on the Web*. Click OK to continue.
- The IRS.gov screen will appear next. Enter information requested and click on Submit.
- Once the IRS has validated your identification, you will be provided a list of all possible fields from a tax return that could transfer back into the FAFSA form. (Actual data is encrypted and will not be viewable).
- Click on box under "Transfer My Tax Information into the FAFSA." Then click on the Transfer Now button.
- Follow instructions to return to *FAFSA on the Web* to complete the FAFSA.
- Remember to electronically sign and submit the FAFSA again!

IRS Tax Return Transcript Request Online Instructions

Tax filers can request a transcript PDF, free of charge, by ordering online.

- Go to www.irs.gov
- Under the Tools section, click "Get Your Tax Record"
- Click "Get Transcript Online" or Click "Get Transcript by Mail"
- Create an account.
- Make sure to request a **2017** Tax **Return** Transcript PDF. Once you can access the PDF, mail or send encrypted email to:

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