

Before you begin:

For Students and Parents of Dependent Students, make sure you have the following:

- Your FSA ID used for the FAFSA. If you do not remember this ID you can go to fsaid.ed.gov and click “Edit My FSA ID” and then “Forgot My Username” to retrieve your ID.
- A copy of your 2015 Federal 1040 tax form so you are typing in the address that matches the IRS records.
- Your taxes must be filed electronically a minimum of 2 weeks prior to attempting this or 6 weeks prior for a paper filing.
- You or your parents must **NOT** have filed their taxes any of these ways...
 - Married Filing Separately
 - Head of Household
 - Marital Status Unmarried and Both Parents living Together
 - Filed an Amended tax return
 - Puerto Rican or foreign tax return
- These instructions are constructed as if you are returning to your FAFSA to update tax data.

Go Here

- www.fafsa.gov

The FAFSA is FREE. Any site telling you otherwise is not the correct site.

Login

- [Click Login](#)

Returning User?

- Make a correction
- Add a school
- View your Student Aid Report (SAR), and more...



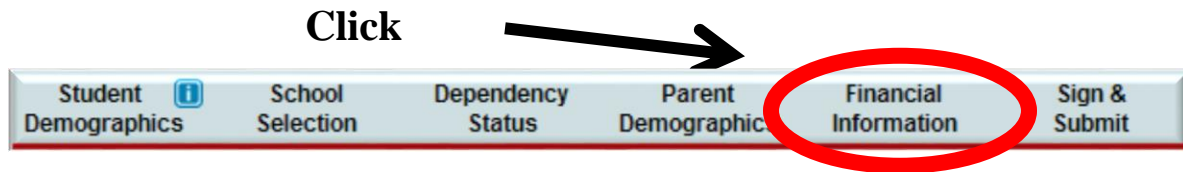
Login

Enter your FSA ID and password.

If you have already completed your FAFSA, you will use the option to make a correction. After clicking on “Make FAFSA Corrections” link, you will create a Save Key (a temporary password

in case you need to exit FAFSA and return to it later) and then click “Next”. Click “Make Corrections to a Saved FAFSA”.

You will then need to click the Financial Information tab along the top.



NOTE:

If this is your first time filling out the FAFSA this step does not apply because you have no FAFSA yet to make corrections to. You will need to start your FAFSA and can use the IRS Data Retrieval Process there also.

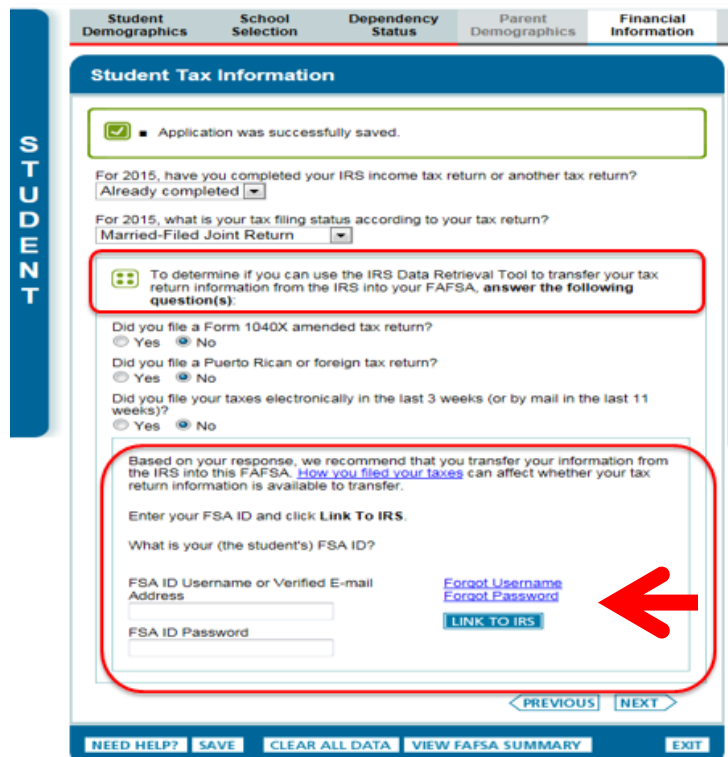
Student Data Retrieval

• Using the IRS Data Tool

The Student Financial Information page will ask about the taxes you filed. If you filed electronically, please wait at least 2 weeks before trying to use the IRS data retrieval.

Dependent students may have to do the Parent Data Retrieval first. Please see “Parent Data Retrieval” section below.

If you answered “yes” to any of the listed options you will be unable to use the IRS Tool.



The screenshot shows the 'Student Tax Information' page. A vertical blue bar on the left contains the word 'STUDENT'. The page has a navigation bar at the top with tabs for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', and 'Financial Information'. The main content area includes a success message, two questions about tax returns, and a section for the IRS Data Retrieval Tool. This section is highlighted with a red box and contains instructions, a 'LINK TO IRS' button, and input fields for FSA ID information. A red arrow points to the 'LINK TO IRS' button. At the bottom, there are buttons for 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'.



NOTE: Don't miss the **March 1st Deadline!** If needed, use estimates to be sure it is filed on time and then complete this process after your taxes are completed.

Click the “**Link to IRS**”. When it prompts about leaving the FAFSA Website you are going to click the Blue Ok button.

After you have linked to the IRS Website you are going to fill in the blank information so that it matches your federal tax return.



IMPORTANT: The address information is very sensitive and must be accurate in order to work. For example, “street” can be a variety of ways such as “St.”, “St” or “Street”. If it is not **exactly** the same as it is the IRS Database it will not work. The best way is to use your federal 1040 tax returns.

First Name *	Jane
Last Name *	Doe
Social Security Number *	*** - ** [REDACTED]
Date of Birth *	1 / 1 / 1990
Filing Status * ?	Single
Address - Must match your 2015 Federal Income Tax Return. ?	
Street Address *	[REDACTED]
P.O. Box (Required if entered on your tax return) ?	[REDACTED]
Apt. Number (Required if entered on your tax return)	[REDACTED]
Country *	United States
City, Town or Post Office *	[REDACTED]
State/U.S. Territory *	Select One
ZIP Code *	[REDACTED]

After you have filled in the blank boxes, click the “**Submit**” button in the bottom right hand corner of the web page. After you click the “**Submit**” button, you are going to then click the check box next to the “**Transfer my Tax Information to the FAFSA**”, and then click the now highlighted “**Transfer now**” button.

Transfer My Tax Information into the FAFSA ?

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information. Transfer Now ?

Do Not Transfer My Tax Information and Return to the FAFSA ?

By clicking the “Do Not Transfer” button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA. Do Not Transfer ?

After you transfer the information you will be taken back to the FAFSA. For independent students only, please skip to the “Signing” Step. Dependent students see below.

Parent Data Retrieval

• For Dependent Students

The process for linking tax data for Parents of Dependent students is similar to linking Student tax data. Only the first couple of steps differ from the student’s process and are covered below.

If your parents have to select “yes” to any of the options in this section, they are unable to use the IRS Tool.

If none of the conditions apply you are going to be given the option to link to the IRS. They will sign in using their FSA ID and click the “**Link to IRS**” button. A prompt about leaving the FAFSA will show which is okay and necessary.

Parent Tax Information

Application was successfully saved.

For 2015, have your parents completed their IRS income tax return or another tax return?
Already completed

For 2015, what is your parents' tax filing status according to their tax return?
Married-Filed Joint Return

To determine if you, the parents, can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into the FAFSA, answer the following question(s):

Did you, the parents, file a Form 1040X amended tax return?
 Yes No

Did you, the parents, file a Puerto Rican or foreign tax return?
 Yes No

Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
 Yes No

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

Which parent are you?
Select

What is your (the parent's) FSA ID?

FSA ID Username or Verified E-mail Address

FSA ID Password

[Create an FSA ID](#)
[Forgot Username](#)
[Forgot Password](#)

LINK TO IRS

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Use the same steps as you did for the student to complete from this point until the IRS DATA RETREVIAl is completed and you are back into the FAFSA. Then proceed to next step.

Signing & Submitting

• Signing your FAFSA

Even if you are just making corrections or filling out the FAFSA for the first time please be sure to click the next button and sign your FAFSA using all relevant FSA ID’s, including parents if you are dependent student.

Be sure to submit the FAFSA after signing it!