

### 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](https://fsaid.ed.gov) and click “Edit My FSA ID” and then “Forgot My Username” to retrieve your ID.
- A copy of your 2017 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
  - Puerto Rican or foreign tax return
- These instructions are constructed as if you are returning to your FAFSA to update tax data.

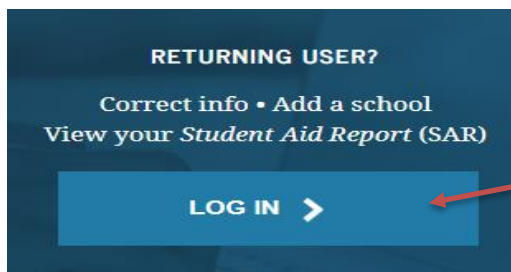
Go Here

- [fafsa.gov](https://fafsa.gov) website

<https://fafsa.ed.gov/> The FAFSA is FREE. Any site telling you otherwise is not the correct site.

Login

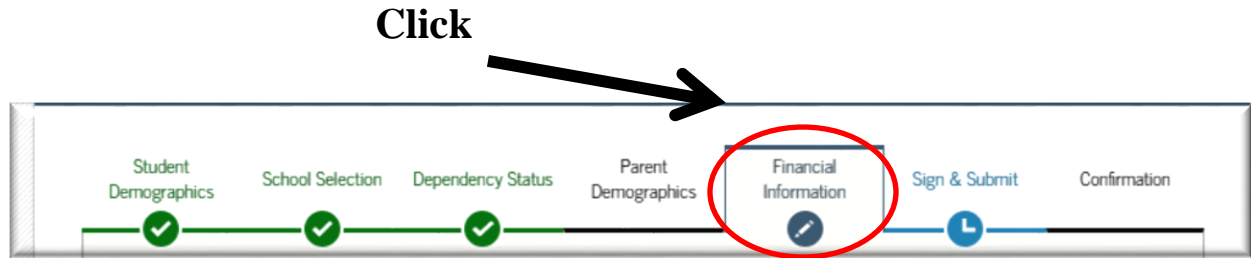
- Click Login



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:**

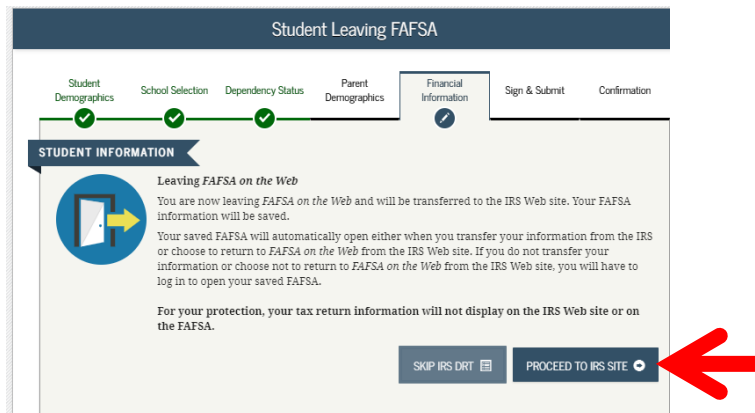
If this is your first time filing the FAFSA this step does not apply because you have no FAFSA to make corrections to. You will need to start your FAFSA and can use the IRS Data Retrieval Process once you reach the Financial Information section.

## 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 will have to do Parent Data Retrieval first. Please see “Parent Data Retrieval” section below.**



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 *	GDIT
Last Name *	DATA
Social Security Number *	*** - **
Date of Birth *	01 / 01 / 1994
Filing Status * ?	Married-Filed Joint Return
Address - Must match your 2016 Federal Income Tax Return. ?	
Street Address *	
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	
Country *	United States
City, Town or Post Office *	
State/U.S. Territory *	Select One
ZIP Code *	

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 to FOTW 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.

**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.

Transfer Now ?

Do Not Transfer ?

This data will be noted on the FAFSA as “Transferred from the IRS”. For your protection, the actual numeric data will not display on the IRS website or the FAFSA. You will not be able to change these “transferred data” fields either, as it will be transferred exactly as it was processed by the IRS. If you filed an Amended Tax Return, it will be the *original* tax information.

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 continue to the next page.

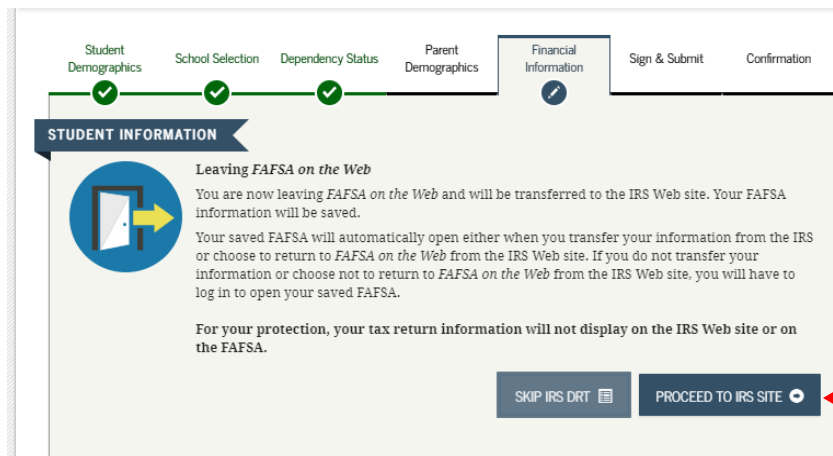
## Parent Data Retrieval

### • 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.



The screenshot shows a progress bar at the top with steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Financial Information' step is currently active. Below the progress bar, a blue banner reads 'STUDENT INFORMATION'. A circular icon with a document and arrow is next to the heading 'Leaving FAFSA on the Web'. The text below explains that the user is leaving FAFSA on the Web and will be transferred to the IRS Web site, and that their FAFSA information will be saved. It also states that tax return information will not display on the IRS Web site or on the FAFSA. At the bottom right, there are two buttons: 'SKIP IRS DRT' and 'PROCEED TO IRS SITE'. A red arrow points to the 'PROCEED TO IRS SITE' button.

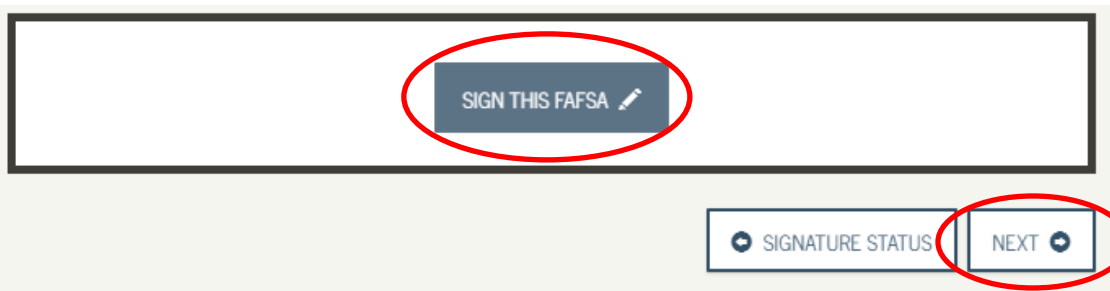
Use the same steps as you did for the student to complete from this point until the IRS DATA RETRIEVAL is completed and you are back into the FAFSA. Then proceed to next step.

## 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!



The screenshot shows a button labeled 'SIGN THIS FAFSA' with a pencil icon, circled in red. Below it, there are two buttons: 'SIGNATURE STATUS' and 'NEXT', both circled in red.

**Trine University Financial Aid Office will be notified within 5 – 7 business days. If after that point you receive notification we have not received the information, please contact our offices at 800-347-4878.**