

Steps to use IRS Data Retrieval Tool on the FAFSA

Once logged into the FAFSA Application, click "Financial Information" for Student and if applicable, the Parent(s)

Select "Already Completed" if you or parent(s) completed an 2013 IRS Income Tax Return

Answer "No" to filing an Amended Tax Return and filing Puerto Rican or Foreign Tax Return

Answer "No" to filing tax return electronically within the last 3 weeks or 11 weeks, if mailed

Enter your PIN and/or parents' PIN in order to access the IRS Website, then select "OK" to leave FAFSA website

Once on the IRS website, select the Filing Status and enter your address exactly as it appears on your tax return. Once finished, select submit

Once IRS validates the identity and address provided, the tax return information will display

Check the box to transfer tax information to the FAFSA and select "Transfer Now"

The tax information will be transferred to the FAFSA and you will return to the FAFSA website

*To eliminate errors, use the
IRS Data Retrieval Tool.
IT'S EASY!*

*Review Items 1–4 below to make
sure you qualify to use the tool.*

You can download your tax information from the IRS website if:

1. It has been **at least 3 weeks since the tax return was electronically filed or 11 weeks if mailed**,
2. You **did not** file an amended tax return,
3. You **did not** file a tax return in Puerto Rico or a foreign country, And
4. If married, **did not** file a separate return from spouse.

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