



## Data Retrieval Tool Instructions

### **IRS DATA RETRIEVAL TOOL INSTRUCTIONS**

The IRS Data Retrieval Tool will be used to import tax information into the FAFSA for each tax filer. This means that if both the student and the parent(s) filed a Federal Tax Return, this process will need to be followed twice - once for Parent Tax Information and once for Student Tax Information. Also, keep in that FAFSA is looking for the prior-prior year's tax return. **In order to use the IRS Data Retrieval tool, you must have filed a Federal Tax Return at least 2-3 weeks prior.**

1. Log into your FAFSA ([www.fafsa.ed.gov](http://www.fafsa.ed.gov))
2. Click on **"Make FAFSA Corrections"**
3. Go To the **"Financial Information Tab"**
4. Have you completed your Tax Return?? Use drop down box to say **"Already Completed"**
5. How did you file? Use drop down box to answer accordingly
6. Answer next 3 Questions correctly (In order for the Link to appear all answers should be NO).
7. Decide which parent ID you will be using (Parent 1 or Parent 2)
8. Enter the Parent FSA ID and PASSWORD
9. Click **"LINK To IRS"**
10. Click **"OK"** (This is just telling you that you are entering IRS website).
11. **Enter Address as listed on the tax return.** (It is VERY important that you confirm the Name, Date of Birth, Filing Status, and Address EXACTLY as it appears at the top of the Federal Tax Return in order to ensure a match.)
12. **Click on Submit**
13. All tax data should appear on next screen.
14. Click **"TRANSFER NOW"**
15. You should automatically return to the FAFSA if everything worked.
16. REPEAT ALL OF THE ABOVE IF YOU STUDENT FILED FEDERAL TAXES. If the student did not file, make sure "Not Going to File" is selected on the Student Financial Information page.
17. **BEFORE YOU ARE FINISHED YOU MUST SIGN AND SUBMIT THE FAFSA USING BOTH STUDENT FSA ID/PASSWORD AND PARENT FSA ID/PASSWORD! VERIFICATION WILL NOT BE COMPLETE UNTIL THE FAFSA IS SIGNED AND SUBMITTED!!!**

**ERRORS:** If you encounter error messages, you are not alone. The culprit is likely one of the following issues:

- You filed your tax return too recently - if this is the case, wait until it has been three weeks since you submitted the form, then return to the FAFSA and repeat the above steps to try again.
- You filed a paper form instead of filing electronically – the IRS processing of a paper form can take up to 8 weeks, so you will need to wait then return to the FAFSA and repeat the above steps to try again.
- You didn't type your address exactly as it appears on your tax return - this system can be very touchy, for example: *Rd*, *Rd.*, and *Road* are all different possible entries for "Road". Just go back through the process and try again!
- Your filing status or the tax return form you filed are not eligible for use of the Data Retrieval Tool (refer to the list of scenarios at the beginning of these instructions to double-check).

*None of these fit your situation? If you are having a hard time finding a way to resolve your issue, contact us and we will help you through it - just call the Financial Aid Office at 937.327.7321.*

***Once this information is transferred into your FAFSA, you must not change it in any way. Any changes made to information transferred in using the IRS Data Retrieval Tool will void all transferred information and the process will need to be repeated in order to complete Verification of your income information.***