IRS Data Retrieval Tool Instructions

The IRS Data Retrieval Tool is a feature on FAFSA that transfers tax information onto your financial aid application. This tool is available 2 – 3 weeks after you submit your Federal Tax Return electronically (6 – 8 weeks if you filed taxes by mail.) It is highly recommended that you use this tool to complete your FAFSA.

1. Log onto FAFSA (www.fafsa.gov) and click on MAKE FAFSA CORRECTIONS. **If you have already started a correction but did not complete it, click CONTINUE and enter the PASSWORD created when you started the correction.

2. If you are an INDEPENDENT student, select the “FINANCIAL INFORMATION” tab, then click “LINK TO IRS”.
   a. If you are a DEPENDENT student, you also need to select the “PARENT DEMOGRAPHICS” tab and enter your parents’ FSA ID, then click “LINK TO IRS”.

3. There will be a pop-up telling you that you are leaving the FAFSA page, click OK.

4. Once the IRS website appears, there will be a pop-up notifying you that you are on the IRS website, click OK.

5. Fill in the required information, click SUBMIT.

6. You will see the summary of the tax information from the IRS, scroll to the bottom of the page and check the box that says “Transfer My Tax Information into the FAFSA.”

7. Then click the “TRANSFER NOW” button. It will take you back to the FAFSA application. DO NOT CHANGE any information that was transferred from the IRS (indicated by “TRANSFERRED FROM IRS”).

8. Review your application to make sure it is complete since the IRS Data Retrieval Tool transfers only some of the information needed.

9. Once you are done, click the “SIGN AND SUBMIT” tab.

10. Be sure to select AGREE and SUBMIT to submit the updated application.

If you are unable to use the IRS Data Retrieval Tool, you can order your Tax Return Transcript by mail through the IRS Web site at http://www.irs.gov (select Get-Tax Transcripts by mail). If you are having problems ordering your transcript online, you may contact the IRS at 1-800-908-9946 to order a Return Transcript by phone. You may also visit the Honolulu IRS Office at 300 Ala Moana Blvd or the IRS office nearest you.