IRS DATA RETRIEVAL TOOL INSTRUCTIONS

VISIT: [www.fafsa.ed.gov](http://www.fafsa.ed.gov)

A) Visit the FAFSA homepage, then

B) Click on “Start Here”.

LOGIN

A) Enter your first and last names, Social Security Number (SSN), and date of birth (DOB), then

B) Click “Next”.

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A) Once you’ve reached the “May FAFSA” page, click on the “Make FAFSA Corrections” link.

**PIN AND PASSWORD**

A) In order to make corrections, you’ll need to type your Personal Identification Number (PIN),

B) Create a temporary Password – something easily remembered, then

C) Re-enter the password, and

D) Click, “Next”.

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**MAKE CORRECTIONS**

A) Once you’ve reached the “May FAFSA” page, click on the “Make FAFSA Corrections” link.
FINANCIAL INFORMATION

A) Once you’ve successfully logged into your FAFSA, click on the “Financial Information” tab – located at the top of the screen between the “Parent Demographics” and “Sign & Submit” tabs.

FILING STATUS

A) At the Financial Information page, check all applicable filing status’ or “None of the above” to determine whether the IRS Data Retrieval Tool is available.
A) If available, the IRS Data Retrieval link will appear below your checked filing status, then

B) Click on, “LINK TO IRS”.

CONTINUE TO IRS DATABASE

A) A page will appear, warning you that you are leaving the Free Application for Federal Student Aid (FAFSA) website,

B) If you wish to continue using the Tool, click on, “OK”.
**IRS DATABASE**

A) Another page will appear, warning that you’re entering the IRS database,

B) If you wish to continue, click on, “OK”.

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**CONFIRM TAX INFORMATION**

A) Select your “Filing Status” using the drop-down tab;

B) Enter your “Street Address / P.O. Box / Apt. Number”,

C) Confirm your country of residence,

D) Enter the “City / Town / Post Office”,

E) “State / U.S. Territory”, and

F) “ZIP Code”, then

G) Click, “Submit”.

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**REVIEW TAX INFORMATION**

A) Provided the contact and filing information matches what was submitted on your Federal Tax Return, you should be able to review the tax information transferrable to your FAFSA form.

**REVIEW TRANSFERRED DATA**

A) After successfully transferring your tax information, updated elements will have "Transferred from the IRS" in bold above each affected field.
SIGN AND SUBMIT

A) Select the “Sign and Submit” tab – located between the “Financial Information” and “Confirmation” tabs at the top of the browser.

REVIEW FAFSA CHANGES

A) Prior to submission, a summary of changes made to your FAFSA will appear. Review these updates and click on “NEXT”.

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SIGN AND SUBMIT

A) Sign your updated FAFSA by entering your PIN, and

B) Click “Sign”.

C) Once signed, click on “Agree”, and

D) Then “Submit My FAFSA Now”.

CONFIRMATION AND EXIT FAFSA

A) Successfully linking to the IRS database and submitting your updated FAFSA will be followed by a new 2012-13 Confirmation Page.

B) Print the confirmation page for your records, then exit your updated FAFSA application by clicking on “Exit” and “OK”.

C) After exiting the Confirmation Page you will return to the “My FAFSA” page.

D) Click on “Logout” to return to the FAFSA homepage.
A) After exiting the Confirmation Page you will return to the “My FAFSA” page,

B) Click on “Logout” to return to the FAFSA homepage, then

C) Once you have returned to the FAFSA homepage, close your internet browser. The resubmitted application will take 2-3 business days to process, and then results will be forwarded onto NCU. In addition to using the IRS Data Retrieval Tool, students and parents (if applicable) will need to provide:

1. A completed Verification Worksheet,

2. All household W-2’s,

3. Unemployment documents (if applicable), and

4. Food Stamp documents (as applicable).