



IRS Data Retrieval Tool Steps

1. Log into the FAFSA website (www.fafsa.ed.gov)
2. Click "Make FAFSA Corrections" link (bottom left of screen)
3. Login
4. Click next
5. Click "Financial Information" tab across top of page
6. Answer question "For 2015, have your parents completed their IRS income tax return or another tax return" by clicking drop down box and choosing "Already completed."
7. A series of questions will appear to determine if you are eligible to use the IRS Data Retrieval Tool.
8. If you check any box other than the "None of the above" box, you ARE NOT eligible to use the IRS Data Retrieval process. If you can only check the "None of the above" box then you will be permitted to proceed to the next step.
9. If you select the "None of the above" option you will be presented with the option to choose which parent you are (Father/Mother) and enter your pin.
10. Click "Link to IRS"
11. Next you will be notified that you are leaving FAFSA on the web...click OK
12. Next will appear the page "Get My Federal Income Tax Information"
13. Enter all required information exactly as recorded on your tax return
14. Click submit
15. If the IRS is able to validate your identity, your tax information will display
16. Review information
17. Click "Transfer Now"
18. Next click "OK" and you will return to the FAFSA website
19. Repeat steps 6 -18 for Student Financial Information if student filed taxes
20. After you have completed both Parent and Student IRS data retrieval process, click the "Sign and Submit" tab (across the top of the page)
21. Your corrections will be saved
22. Click Submit

There is also instructions available through a YouTube video located at:

http://www.youtube.com/watch?v=W47_YTRVYD4&context=C38450b8AD0EgsToPDskIL03WHdy5ZrYipQvH99d_hb

If you are unable to use the linking process, you will need to order a tax transcript from the IRS. You will need to wait 2 to 3 weeks after filing your taxes before this option will be available. You can order a transcript by going to <http://www.irs.gov/Individuals/Order-a-Transcript>. You can now print the tax transcript from the website. You will need to sign each page of the transcript before submitting it to the financial aid office.

Reasons you cannot use the linking process and must order a tax transcript are:

- You have not waited the 2 to 3 weeks since you filed your taxes
- You filed an amended return
- You filed as head of household
- You filed a non-US tax return
- You owed taxes with your return and did not pay them (will not be able to get transcript or link)
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If you have any questions or need further help, please call Sterling College's Financial Aid Office at 620-278-4207.