

Instructions for Corrections and Updates to your FAFSA to use the IRS Data Retrieval Tool

If you wish to reduce the chances of having to submit an IRS Tax Return Transcript, you may edit your FAFSA to use the IRS Data Retrieval Tool. This option could save you time. Many students have found that if they use this tool, they do not need the tax return transcript from the IRS. We encourage you to order the Tax Return Transcript as soon as possible however just in case the IRS tool does not work for you.

You can also edit the FAFSA if you originally reported that you “will file” taxes once you have completed your taxes with the correct answer of “already completed”. You should wait the appropriate length of time (two weeks if you filed your taxes electronically and 8 weeks if you filed by mail) and follow these steps:

1. Log back into www.fafsa.gov.
2. Click on Make FAFSA Corrections.
3. Click on Financial Information tab.
4. If you originally answered “Will File” change to “Already Completed”.
5. If you are eligible to use the IRS Data Retrieval Process, click on the Link to IRS link and click OK.
6. On the IRS Web site, enter the requested information and click submit.
7. Click the box under the “Transfer My Tax Information into the FAFSA” and then click Transfer Now.
8. You should then receive a message “You have successfully transferred your 2012 tax information”.
9. Be sure to finish going through all the steps and electronically sign (if dependent student one of your parents also needs to electronically sign) and submit your FAFSA. **You are not finished until you have successfully submitted your FAFSA and received a confirmation number.**

There are a few situations in which you are unable to use the IRS Data Retrieval Process. In these cases, if you are selected for verification, you will need to submit an IRS Tax transcript.

1. Married and filing separately – submit transcript for each spouse
2. Filed an amended tax return
3. Filing a Puerto Rican or foreign tax return
4. Had a recent change in marital status