

IRS Data Retrieval Instructions

1. Log in to fafsa.gov with your FSA username and password.
2. Select "Make FAFSA Corrections."
3. Create a Save Key and select "Next."
4. Click on the "Financial Information" tab. Select "Already Completed" for the tax return filing status and answer the eligibility questions.
5. If you are eligible to use the IRS Data Retrieval Tool, you can now select the "Link to IRS" button. If you are not eligible to use the IRS Data Retrieval Tool, [contact the IRS](#) to order a tax return transcript.
6. Select "OK" to leave the FAFSA website and enter the IRS Data Retrieval Tool website.
7. Select "OK" to accept the IRS Data Retrieval Tool terms of use.
8. Enter the requested information and select "Submit." Remember to enter your address exactly as it was written when you filed your taxes.
9. Check the box to "Transfer My Tax Information into the FAFSA" and select "Transfer Now." Your IRS data will be automatically transferred into your FAFSA and you will be re-directed back to the FAFSA website.
10. **Do not change any answers that say "Transferred from the IRS"** or our office may require you to supply additional documentation. Answer any additional questions and select "Next."
11. Continue to the "Sign & Submit" tab. Follow all of the instructions carefully to submit your FAFSA corrections.

Questions? Contact us at finaid@ucr.edu