IRS DATA RETRIEVAL TOOL INSTRUCTIONS

The IRS Data Retrieval Tool allows students and parents to access the IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA) and transfer the data directly into their FAFSA from the IRS Web site. If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using the tool for several reasons:

- It’s the easiest way to provide your tax data.
- It’s the best way of ensuring that you’re FAFSA has accurate tax information.
- You won’t need to provide a copy of your (or your parents’) tax return transcript(s).

HOW TO USE THE IRS DATA RETRIEVAL TOOL

**Please Note:** Students or parents who are married and filed as Married Filing Separately, are married and filed as Head of Household, filed an amended tax return, or filed a Puerto Rican or foreign tax return are not eligible to use the IRS Data Retrieval Tool. Also, if there has been a change in the marital status of the applicant or parent (if the applicant is a dependent student) after the end of the tax year, the applicant will not be able to use the IRS Data Retrieval Tool.

1. Access your internet browser and go to www.fafsa.gov & select “Log In”
2. Enter student First Name, Last Name, Social Security Number, and DOB. Click Next.
3. Near the bottom click on Make FAFSA Corrections.
4. Then enter your PIN and the password you created when you filed your FAFSA. If you did not create a password at that time, create one now. Click Next.
5. Navigate to the Financial Information section.
6. The first question in this section if a dependent student will ask if your parents already completed an IRS income tax return. If you are an independent student it will ask if you have already completed an IRS income tax return. Select “already completed” from the drop down box and you will be presented with a series of questions to determine your eligibility to use the tool. If you select “no” to each of the questions the option to enter your PIN and link to the IRS will display. Follow this link.
7. Next you will be notified that you are leaving FAFSA on the web. Click OK.
8. Once on the IRS website enter the requested information. Be sure to enter all of the information exactly as it appears on your tax return. Click Submit.
9. If the IRS is able to validate your identification your IRS tax information will display. Click transfer now and then return to the FAFSA website using the links provided.
10. If you are a dependent student and you filed taxes you may proceed to student tax information in the financial information of the FAFSA and repeat the above steps to retrieve your tax information.
11. Once completed, proceed to the sign and submit section and submit your corrections. Your FAFSA should be received electronically within 24-48 hours.

If you need additional assistance, the following link is a video showing you how to use the FAFSA Data Retrieval Tool: [http://www.youtube.com/watch?v=QJYE4PTYRfs](http://www.youtube.com/watch?v=QJYE4PTYRfs)

**NOTE:** Please do not forward copies of your Federal tax returns to Belhaven University.

Return this form and required documents to:

Office of Student Financial Services * Belhaven University * 1500 Peachtree Street * Jackson, MS 39202
Fax 662-796-3081 * email studentaid@belhaven.edu

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