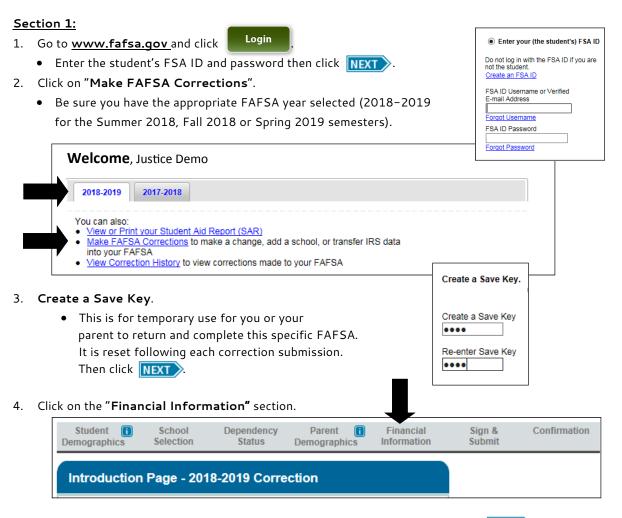
## Wilmington College

## **IRS Data Retrieval Tool Instructions**

Importing Income Tax Information into the FAFSA

Internal Revenue Service (IRS) data is available 2–3 weeks after electronically filing your taxes or 8–11 weeks after filing a paper tax return. These instructions assume you have already filed the Free Application for Federal Student Aid (FAFSA).



- If you want to use the IRS Data Retrieval Tool for the STUDENT ONLY, click **NEXT** at the bottom of the page. To use the retrieval tool for PARENT or BOTH, continue to Step 5.
- 5. Make certain the Tax Filing Status is "Already Completed".

For 2016, have your parents completed their IRS income tax return or another tax return?

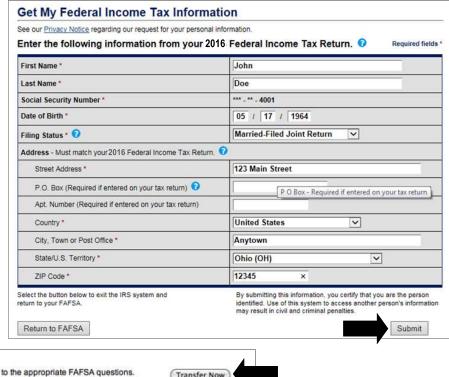
Blank
Already completed
Will file
Not going to file

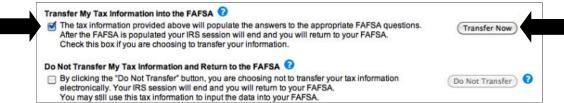
- 6. A series of questions will then appear. If you can answer "NO" to all of the questions, you will be eligible to use the Data Retrieval Tool.
  - If you are ineligible to use the Data Retrieval Tool, you will need to request a Tax Return Transcript from the IRS. You are able to do this online at <a href="www.irs.gov">www.irs.gov</a>. Skip to Section 2 for additional instructions on obtaining your IRS Tax Return Transcript.
- Enter the requested FSA ID and click On the following page, click "OK".



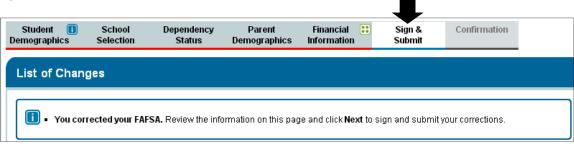


- 8. You should now be accessing the IRS website. Enter the requested information <u>exactly</u> as it appears on your tax return.
  - First and Last Name, Date of Birth, Filing Status, and Address.
- Click "Submit". If the IRS is able to validate your identity, your IRS tax information will be displayed.
- 10. Check the p to "Transfer My Tax Information into the FAFSA".
- 11. Click "Transfer Now".





- 12. You will be taken back to the FAFSA. You will see that your IRS information has been entered into most of the questions.
  - DO NOT CHANGE ANY NUMBERS labeled "Transferred from IRS" or you will invalidate the data retrieval.
  - Income from Work does not transfer from the IRS so be sure the enter any income that was earned from wages, a
    business or a farm in this field.
  - If needed, you may now repeat the steps above for the Data Retrieval Tool for the Student.
- 13. Click on "Sign & Submit".



- 14. Review the changes that have been made and check for accuracy. Remember, do not change any values that are denoted as "Transferred from IRS" as you will invalidate the IRS Data Retrieval.
  - Click **NEXT** to continue.
- 15. Only the parent will need sign the FAFSA with the FSA ID.
  - The student already logged in with their FSA ID.
- 15. Enter parent FSA ID (when applicable), click on SIGN and agree to the terms of use.
- 15. Click SUBMIT MY FAFSA NOW
- 16. When the screen titled "2018-2019 Confirmation Page" appears,

YOU ARE DONE!

The school will receive your corrected FAFSA in 3-5 business days.

