

Instructions for Linking Taxes to FAFSA

These are step-by-step instructions for using the IRS Data Retrieval Tool on your FAFSA to answer all of the financial information. You will not be able to complete this step if you recently filed a return or an amended return or if you are married and file separate returns.

★ **If you cannot complete this process for any reason, you will be required to request the tax return transcript from the IRS.**

Log in to your current FAFSA at www.fafsa.ed.gov.

Select the FAFSA application you wish to correct.

Click “Make FAFSA Corrections”.

Click “next” while verifying all of the information is correct until it asks for your parents’ tax information (if you are considered DEPENDENT).

When you get to the financial information page, it will ask three things.

1. Have you filed an electronic return within the last 3 weeks?
2. Have you filed an amended return?
3. Have you filed a foreign return?

If you can answer “no” to each of these questions, you’ll be presented with the option to link your taxes.

By doing so, a link will appear “View Option to Link to IRS” (parent may have to enter his/her PIN #)

Select type of return filed, address, city, state, and zip code (type this in exactly as it is on return).

Click “transfer” and “transfer now”.

Repeat this process if you filed a tax return.

Click “next” until PIN # is requested for signature.

Sign and agree, then submit FAFSA.

Within 3-5 business days, we should have the new transaction.

If you have problems with this process, please contact Ben Eastes in Financial Aid at (580) 327-8542.