2014-15 STEP BY STEP GUIDE ON IRS DATA RETRIEVAL TOOL

The IRS Data Retrieval Tool allows Students and Parents to transfer their IRS tax information directly into the FAFSA and is highly encouraged in order to ensure accuracy and avoid delays in financial aid processing.

*You must have your 2013 taxes in front of you before starting the Data Retrieval process

*Please note that the process below needs to be done for both Student and Parent(s) (if the student is Dependent and both Student and Parent(s) filed taxes).

*Please note also that if the Student and Spouse (OR the Parents) filed a joint tax return, Data Retrieval will transfer the tax information jointly. If the Student and Spouse (OR the Parents) are legally married but filed separately, they will be ineligible to use Data Retrieval. *If ineligible, see Instructions on next page

Step 1: Go to www.fafsa.ed.gov and Login

Step 2: Fill in Name, SSN, and DOB

Step 3: Click on ‘Make FAFSA Corrections’

Step 4: Enter your PIN number and password

Step 5: Click on ‘Financial Information’

Step 6: If you might be eligible for Data Retrieval based on your tax filing status, you will be presented with several Yes or No questions to determine your eligibility to use Data Retrieval. If you are eligible, enter your PIN & ‘Link to IRS’

NOTE: The bar on the left tells you if you are modifying “Student” or “Parent” info.
Step 7: This pop-up will appear to warn you that you are leaving the FAFSA site to go into the IRS website. To accept, click OK.

Step 8: On the IRS screen, fill in Filing status, street address, City, State, Zip. This MUST match EXACTLY the information as filed on your taxes.

Step 9: If information cannot be retrieved, the screen below will show why. *See instructions below.

Step 10: If information matches, you can check the agreement and click on ‘Transfer Now’.

Step 11: The fields on your FAFSA will fill in.

Step 12: DO NOT make changes to any of the IRS information that pulled in. This will invalidate the Data Retrieval. If you believe any of the information is incorrect, contact Student Financial Services at sfs@bridgeport.edu or 203-576-4568 as soon as possible.

Step 13: Make sure you go all the way through and Sign and Submit Your FAFSA. NOW you are done.

*IF DATA RETRIEVAL DOES NOT WORK:*
If you were asked to submit tax information to Student Financial Services and Data Retrieval does not work for the Student (or Parents/Spouse), you need to order 2013 Tax Return Transcripts, which can be obtained from the IRS at http://www.irs.gov/Individuals/Order-a-Transcript or at 1-800-908-9946.
Once you receive the IRS Tax Transcripts, you will need to submit them to the Student Financial Services Office.