

# FMU FINANCIAL ASSISTANCE OFFICE

## VERIFICATION: IRS DATA RETRIEVAL INSTRUCTIONS

If you were selected for verification you must verify your tax information supplied on your FAFSA. You can have your IRS Tax information verified through the “IRS Retrieval” offered on the FAFSA .

1. Go to [www.FAFSA.gov](http://www.FAFSA.gov) and complete the sign information

2. Scroll down and select “**Make FAFSA Corrections**”

3. Select “**Financial Information**” tab.

- The “IRS Data Retrieval” screen will appear
- Select “Already Completed” from the drop down menu
- If not, select “None of the above”
- Enter your FAFSA PIN and select “Link to IRS”

4. A warning page will appear informing you are about to leave the FAFSA website. That is fine...

5. If you are told that IRS Tax information is not available, you will have to order a Tax Transcript.

6. If your data is available you will be asked to verify some information.

- Confirm your name
- Select the appropriate TAX Filing status
- Enter the address used on your taxes. If your address ends with court, street, avenue, or roads use the appropriate abbreviation without any punctuation marks. PO boxes also do not require punctuation marks.
- Click on “Submit”
- A screen should appear with the information to be transfer to your FAFSA (if not, see below)
- Select “Transfer my Tax Information into my FAFSA” and click “Transfer Now”.
- **Note: If any information generated from the data transfer is altered, the transfer will no longer be eligible. The student will be requested to submit a tax return transcript.**

7. The information will update the FAFSA and you will be returned to the FAFSA website.

- If you are a “Dependent” student you will need to complete the steps for both the student and a parent.

8. Submit your application

9. Your updated information will be sent to the financial aid office.

10. Complete the Verification Worksheet, found online at:

<http://www.fmarion.edu/enrollment/downloadofficeformsandpub>

For 2011, have your parents completed their IRS income tax return or another tax return?  
Already completed ▾

 You, the parents, may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Check all that apply or check **None of the above**.

- You, the parents, filed as Married Filing Separately
- You, the parents, filed as Head of Household
- You, the parents, filed an amended tax return
- You, the parents, filed a Puerto Rican or foreign tax return
- You, the parents, recently filed taxes
- None of the above

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA.

Enter your PIN and click [Link To IRS](#).

Which parent are you?

Father/stepfather ▾

What is your (the father's/stepfather's) PIN?

[Apply For A PIN](#)

[I Forgot/Don't Know My PIN](#)

[LINK TO IRS](#)

### MATCH UNSUCCESSFUL?

- Has it been at least two week since you filed taxes?
- Does the marital status of parent or student match with appropriate filing status?
- Double check the filing status and address you provided to make sure they match your taxes. Note: Use of punctuation marks will make your request unrecognizable.
- If that doesn't resolve the problem you may need to order an IRS Tax Transcript from <http://IRS.gov> . Just click on “[Order a Return or Account Transcript](#)”. Be sure to order a “Tax Return Transcript”.
- If that is unsuccessful you can attain a Tax Return Transcript from an IRS Office; which can be located using this site: <http://apps.irs.gov/app/officeLocator/index.jsp>