



COKE R COLLEGE

VERIFICATION: IRS DATA RETRIEVAL INSTRUCTIONS

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

1. **POINT** your web browser to <http://www.fafsa.ed.gov>
 2. **CLICK** on “Start Here”
 - You must enter your first name, last name, SSN, and your date of birth
 - Click “Next”
 3. **Select** the “2018-2019” tab
 4. **Scroll down** and select “**Make FAFSA Corrections**”
 - **You must enter your FSA ID**
 - You must **create a temporary Password**. This password will be deleted when you hit “submit”
 - Click “Next”
 5. **Select “Financial Information” from the bar across the top.**
 - The “IRS Data Retrieval” screen appears
 - Select “Already Completed” from the drop down menu
 - Five Yes/No questions will be asked. (If you answer “Yes” to any of these then you will need to request an IRS Tax Transcript, you may request a transcript at www.irs.gov.)
 - If Dependent, select your parent and the parent will enter his or her FSA ID
 - If Independent, enter your FSA ID
 - Click on “Link to IRS”
 6. **A page will come up warning that you are about to leave the FAFSA website. Continue to the next page.**
 7. **Follow the on-screen instructions.**
 8. **If you are told that your IRS Tax information is not available, you will have to order a Tax Transcript.**
 9. **If your data is available you will be asked to verify some information.**
 - Confirm your name, Select your TAX Filing status, Enter the address you used on your taxes
 - Click “Submit”
 - A screen should appear telling you what information will transfer into your FAFSA, review this
 - Select the check box for “Transfer my Tax Information into my FAFSA”
 - Click on “Transfer Now”
 10. **The information will update the FAFSA and you will be returned to the FAFSA website.**
 - Review your changes, select “Next” when ready.
 - If you are a “Dependent” student you will need to complete steps 5-9 for both the student and a parent
 11. **You will be at the “Sign and Submit” section.**
 - Enter your PIN and select “Agree”, click on “Sign”
 - Repeat this step for each person whose information you are updating: Mother, Father, etc...
 - **Select “Submit my FAFSA now”**
 12. **You will get a confirmation page. Print or Save this for your records.**
 - Select “Exit” at the bottom of the page
 - Select “Logout” at the top of the page
 13. **Your updated information will be sent to the financial aid office.**
 14. **Complete the Verification Worksheet if you have not already done so.**
- MATCH UNSUCCESSFUL?**
- If you receive notification that there was no match in the IRS database you should double check your filing status and address you provided to make sure they match your taxes.
 - 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>
 - You may want to re-attempt this process a week later, as it may be a timing issue.