Instructions for completing the IRS Data Retrieval Process

Once you have completed your federal tax return, wait the appropriate length of time (two weeks if filed electronically and 8 weeks if by mail) and follow the instructions:

1. Log into [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
2. Click on “Make FAFSA Corrections”
3. Click on “Financial Information” tab
4. Change from “Will File” to “Already Completed”
5. If you are eligible to use the IRS Data Retrieval option, click on “Link to IRS” and then click “OK”
6. On the IRS web site, enter the requested information and click “Submit”
7. Click the box under “Transfer My Tax Information into the FAFSA”, and then click “Transfer Now”.
8. You should receive the message, “You have successfully transferred your tax information.”
9. Verify that all steps have been completed and electronically sign the FAFSA with your FAFSA PIN. Dependent students require a parent electronic signature using a parent FAFSA PIN.
10. Submit the FAFSA. The FAFSA is not complete until it is successfully submitted and you receive a Confirmation number.

If you are not successful in using the IRS Data Retrieval Tool, it will be necessary to request an IRS Tax Return Transcript. The transcript will need to be submitted to the Office of Financial Aid either by postal mail, fax or attach the transcript in an email and send to financialaid@rowan.edu.

The Tax Return Transcripts may be dropped-off at the Office of Financial Aid located in Savitz Hall. Please make sure that the student’s Rowan ID# is clearly marked on all submitted documents.

To Request an IRS Tax Return Transcript for this year’s FAFSA tax information:

Select: Order a Return or Tax Account Transcript
Click: Order a Tax Return Transcript.

If you need additional assistance, a listing of IRS Taxpayer Assistance Centers may be found at [www.irs.gov/localcontacts](http://www.irs.gov/localcontacts). Before visiting your local office to pick-up a tax return transcript, click “Services Provided” to determine what services are available at that specific location. Services may vary from site to site. Services are provided on a walk-in, no-advance appointment basis. Most local offices provide copies of Tax Return Transcripts (usually available for current year and three prior years). The taxpayer will need to provide two forms of ID including a photo ID.