The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at www.fafsa.gov. Financial aid applicants selected for verification by the federal processor will be required to link their FAFSA with their IRS data using the IRS DRT or submit a Tax Return Transcript. IRS data is available for linking 2-3 weeks after filing taxes if you file electronically, or 8-11 weeks after filing taxes if you submit a paper copy of your tax return to the IRS. It is important not to change information that was transferred into the student’s FAFSA using the IRS DRT. Students should monitor their FinAid Status account at http://FAStatus.trincoll.edu to determine if the IRS DRT or other documentation is required for their file.

The following instructions assume you have already submitted a FAFSA and are meant to help you update your FAFSA application using the IRS Data Retrieval Tool.

1. Log onto your FAFSA application at www.fafsa.gov.

   • To log in, you will need your FSA ID or student information.
2. Once logged in, click on "Make FAFSA Corrections" to bring up the FAFSA information for the current aid year.

- You will need to create a Save Key for these changes.

   Create a Save Key.
   The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.
   Create a Save Key
   Re-enter Save Key

3. Once on the Introduction Page, click "Next".
4. On the Financial Information Tab, update your answer to “Already Completed.” Options will appear to help you decipher whether or not you will be able to use the IRS Data Retrieval Tool (see screen shot below).

![Screen Shot of IRS Data Retrieval Tool](image)

NOTE: If you answer YES to any of the questions, you will not be able to use the IRS Data Retrieval Tool at this time. Please see the bullets below for instructions on how to proceed.

- If you answered YES to: "Married Filing Separately", "Head of Household", or "Amended Tax Return (1040X)", you will not be able to use the IRS Data Retrieval Tool. Instead, you must request a "Tax Return Transcript" from the IRS and submit it to the Financial Aid Office. Do not delay! It may take the IRS several weeks to process your request. For information regarding this process, click here.
- If you answered YES to filing a "Puerto Rican or Foreign Tax Return", please submit copies of those forms to the Financial Aid Office.
- If you answered YES to filing your "taxes electronically in the last 3 weeks (or by mail in the last 8 weeks)" your tax information may not be available yet from the IRS. You may need to wait until the IRS Data Retrieval function becomes available to you. Also, if you owe the IRS any payment of taxes, the IRS Data Retrieval Tool will not be available to you until a few weeks after your payment has been received by the IRS.

5. If you can answer NO to each of the questions, you should be able to complete the IRS Data Retrieval Tool. Click "LINK TO IRS". You will be alerted that you are leaving the FAFSA on the Web. Click “OK”.
6. The IRS website will open to a page entitled "Get My Federal Income Tax Information". Enter your filing status and address information exactly as it appears on your 1040 and press "Submit". (This tool is very sensitive. The information you enter must exactly match your 1040! For example, if on the address line of your 1040 you used the “St.” abbreviation, but you typed the word “Street” into this website, the IRS Data Retrieval Tool cannot match you. Check your 1040 and try again.)

7. If your address was entered correctly, your federal income tax information will populate. Check the box labeled “Transfer My Tax Information into the FAFSA” and then click “Transfer Now” (see screen shot below).

8. Your session with the IRS will close and your information will be transferred into the FAFSA (see screen shot below). Though your information has been transferred successfully, Trinity will not receive the updates unless you continue through to Sign & Submit the FAFSA again. Continue through the FAFSA and complete any blank fields but be careful NOT to change any prepopulated value labeled as “Transferred from the IRS”. If you change any value that is labeled as such, you will be required to complete the IRS Data Retrieval Tool again.

- If both the student and parent filed tax returns, repeat the process so that both parent and student IRS data is transferred.
9. Proceed through to the **Sign & Submit Tab** of the FAFSA and choose “Submit My FAFSA Now” (see screen shot below). This action will send your changes to Trinity. You will know your FAFSA has been submitted successfully when you arrive at the Confirmation Page.

Congratulations, you have now completed the IRS Data Retrieval Tool!