2021 - 2022 IRS Data Retrieval Process

All financial aid applicants selected for verification must verify their FAFSA data before Federal Aid can be awarded. If you are eligible to use the IRS Data Retrieval Tool, you are strongly encouraged to do so as it verifies tax return data more easily and accurately.

If you cannot or do not wish to use the IRS Data Retrieval Tool on your FAFSA, you will be required to send a signed copy of 2019 IRS tax return and schedules to the Financial Aid Office.

How to use the IRS Data Retrieval Tool:

1. If you have not already done so, please apply for a FSA login and password. A FSA login is needed for both student and parent. https://www.nslds.ed.gov/npas/index.htm

   Once you have your FSA login and password, log into https://studentaid.gov.

2. Click on Make FAFSA Corrections (if you have already completed a FAFSA).

3. Click on the "Financial Information" tab.

4. If you have completed your federal tax return, choose "Already completed" from the drop down menu.

5. You will now be given a pop-up box to transfer your IRS data.

6. Once you have clicked on "Link to IRS", you will see the following page:

7. Click "OK". Once you have clicked "OK" you will see the following page:

8. Click "OK". Once you have clicked "OK", you will complete the fields with your IRS data. When you enter your data, you will want to enter it **EXACTLY** as it appears on the first page of your 2019 IRS form 1040. For example, if you live on Main Street and you wrote your address as "Main St." on your tax return, then you enter your address as "Main St" (no period after St or the system will tell you that you have entered incorrect information). You will be allowed three attempts to enter correct information.

   Note: If a PO Box was used as address on the tax return, leave Street Address line blank and enter number only on PO Box line.

   If you are unable to enter correct data after the third attempt, the system will lock you out and you will be required to send a signed copy of your 2019 IRS tax return and schedules.

9. Once you have entered correct data, you will see a screen showing the data that will be transferred to the FAFSA.

10. Check the box under the heading "Transfer My Tax Information into the FAFSA" then click "Transfer Now".

11. Your IRS data will now feed into your FAFSA. Questions that are populated with tax information from the IRS will be marked as such. Do not make any changes to these fields once the data has been linked.

12. You will be prompted to enter in your income from work.

13. If both the student and parent filed tax returns, repeat the process so that both parent and student IRS data is transferred.

14. Then sign your FAFSA (Student and Parent signature for a dependent student) and submit.

15. Congratulations! You have successfully completed the IRS Data Retrieval Process! Within three business days, the Financial Aid Office will receive electronic notification.

If you have questions, contact the Financial Aid Office at Piedmont University at
706-776-0114 or e-mail finaid@piedmont.edu