

## HOW TO VERIFY INCOME INFORMATION REPORTED ON THE FAFSA

Students and/or parents whose income needs to be verified ***must submit*** a tax return transcript or use the IRS Data Retrieval Tool. If taxes were not filed, you must obtain a Verification of Non-Filing Letter. When following the steps below, please use the table listed below for the appropriate tax year.

Academic Year	Tax Year
2018 – 2019	2016
2019 – 2020	2017

### IRS Data Retrieval Tool

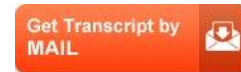
Students or Parents may link tax information directly to the FAFSA application by using the IRS data retrieval tool when initially completing the FAFSA or by logging back into the FAFSA application. **Please note that some tax filers may not be able to use the IRS data retrieval tool.**

*If you cannot link your tax information or choose not to do so, you must request an IRS Tax Return Transcript.*

### IRS Tax Return Transcript

#### Online Request:

- \* Available by logging onto the IRS website at <http://www.irs.gov/Individuals/Get-Transcript>
- \* **Verification of Non-Filing Letter** is also available by online request. **(Parents of dependent students & independent students must obtain this non-filing letter)**



The type of transcript requested should be a **Return Transcript**. The name and address entered should be exactly as it was reported on the tax return for the primary tax filer.

#### IRS2Go App:

- \* Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
- \* Google Play at <https://play.google.com/store/apps/details?id=gov.irs&hl=en>

#### Telephone Request:

- \* Available by calling 1-800-908-9946 and responding to prompts.
- \* Select Option 2 to request an **IRS Tax Transcript** and enter the tax year.
- \* **If you did not file, when you select Option 2 and enter the tax year; this will cause a Verification of Non-Filing Letter to be mailed to you.**

#### Paper Request:

- \* Available by submitting an IRS Form 4506-T. Also, if you need to send your transcript to a different address, complete and submit an IRS 4506-T form. These forms are available online at [www.irs.gov](http://www.irs.gov)
- \* **Verification of Non-Filing Letter** can be requested by using the IRS form 4506-T.

*Student and Parent IRS Tax Return Transcripts should be submitted to the Financial Aid office on the main campus. Do not submit copies of the IRS Tax Account Transcript as this is not an acceptable document. Please be sure to include the student name and ID on each page of the transcript. If you owe the IRS, you may not be eligible to use either of the above options until your obligation is paid in full. **Please note that the IRS will not submit transcripts directly to the institution.***

# **Income Verification Documents Needed for Individuals with Unusual Circumstances**

*All forms should be for tax year associated with academic year, see table above.*

## **Individuals Granted a Filing Extension by the IRS beyond Automatic 6 month Extension**

- A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS;
- A copy of the IRS’s approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time;
- A copy of IRS Form W–2 for each source of employment income received for tax year;
- If self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid; and
- Confirmation of Non-Filing from IRS dated on or after October 1 of the appropriate tax year.

## **Individuals Who Filed an Amended IRS Income Tax Return**

- Use IRS Data Retrieval Tool or obtain an IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A signed copy of IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

## **Individuals Who Were Victims of Tax Administration Identity Theft**

- A Tax Return Database View (TRDBV) transcript obtained from the IRS (IRS Identity Protection Unit 1-800-908-4490), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

## **Individuals Who Filed Non-IRS Income Tax Returns (US Territory, Commonwealth, or foreign central government)**

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer’s income and tax information required to be verified; or
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy income tax return(s).

## **Undocumented Individuals**

- Contact the Financial Aid Office for assistance at 423-585-6811.

## **W2 Information available from the IRS**

If you failed to keep a copy or lost your W-2 forms you may request a Wage and Income Transcript from the IRS by logging onto the IRS website at <https://www.irs.gov/Individuals/Get-Transcript>