

Sandburg Financial Aid
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www.sandburg.edu

2016-2017 Parent Tax Return Transcript and Income Verification

Student's Name: _____ Student ID#: _____ Last 4 SSN: xxx-xx-_____

Your financial aid file was selected for verification. Therefore, you must submit tax and income information using **one** of the following two methods. **PLEASE NOTE:** We are no longer permitted to use copies of tax returns to meet this requirement.

OPTION 1 – The parent/s will use the IRS Data Retrieval from FAFSA (Detailed instructions enclosed)

Approximately three weeks after your parents file their federal tax return electronically and eleven weeks after mailing a paper tax return to the IRS, they may be able to update your FAFSA and copy the tax and income information from the IRS to the FAFSA using the [IRS Data Retrieval Tool \(DRT\)](#). On [www.FAFSA.gov](#), log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions **included** to use the IRS Data Retrieval tool. **This is the preferred method for you to supply tax and income information to our office and will speed up the processing of your financial aid.**

OPTION 2 - The parent/s will submit an IRS Tax Return Transcript (see instructions below)

If your parents are not eligible to use the IRS Data Retrieval Tool, or choose not to use it, they **must request** a Federal Tax Return Transcript from the IRS and submit it to our office.

- If your parents filed taxes, your parents must submit a Federal Tax Return Transcript.
- If the parent filed a joint return and is now separated, divorced, widowed or remarried, the parent must submit a Federal Tax Return Transcript as well as all W-2 forms.
- If your parents were employed but were not required to file a Federal Tax Return, your parents must submit all W-2 forms as well as a Federal Tax Return Transcript that shows they **did not file**.
- If your parents were not employed and had no income earned for 2015, your parents must submit a Federal Tax Return Transcript that shows they **did not file**.
- If your parents filed an amended tax return, they must submit both a Federal Tax Return Transcript and a Federal Tax Account Transcript to our office.

Tax transcripts may be requested from the IRS in the following ways:

1. Submitting an online request at <http://www.irs.gov/>, then click under Tools on 'Get Transcript of your Tax Records'.
2. Calling 800.908.9946
3. Mailing an IRS form 4506-T (to request a tax return transcript) www.irs.gov/pub/irs-pdf/f4506tez.pdf

Did you or anyone in your household receive any of the following in the calendar year of 2015?

SSI ___ yes ___ no Amount _____
TANF ___ yes ___ no Amount _____
SNAP ___ yes ___ no Amount _____

Subsidized housing ___ yes ___ no Amount _____
Energy Assistance ___ yes ___ no Amount _____
Child Support ___ yes ___ no Amount _____

I certify the information provided above is true and complete.

Parent's Signature _____ Date _____

Office use only: _____ date of IRS data match