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## 2016-2017 Student 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 student (and spouse) will use the IRS Data Retrieval from FAFSA (Detailed instructions enclosed)**

Approximately three weeks after the student (and spouse) file their federal tax return electronically and eleven weeks after mailing a paper tax return to the IRS, you 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 application.**

**OPTION 2 – The student (and spouse) will submit an IRS Tax Return Transcript (see instructions below)**

If the students (and spouse) are not eligible to use the IRS Data Retrieval Tool, or choose not to use it, you must request a Federal Tax Return Transcript from the IRS and submit it to our office.

- If student (and spouse) filed taxes, you must submit a Federal Tax Return Transcript
- If the student filed a joint return and is now separated, divorced, widowed or remarried, the student must submit a Federal Tax Return Transcript as well as all W-2 forms.
- If student (and spouse) was employed in 2015 but was not required to file a Federal Tax Return, the student must submit all W-2 forms as well as a Federal Tax Return Transcript that shows they **did not file**.
- If student (and spouse) was not employed and had no income for 2015, the student must submit a Federal Tax Return Transcript that shows they **did not file**.
- If the student filed an amended tax return, you 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 Returns'.
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](http://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 \_\_\_\_\_

Subsidized housing \_\_\_ yes \_\_\_ no Amount \_\_\_\_\_

TANF \_\_\_ yes \_\_\_ no Amount \_\_\_\_\_

Energy Assistance \_\_\_ yes \_\_\_ no Amount \_\_\_\_\_

SNAP \_\_\_ yes \_\_\_ no Amount \_\_\_\_\_

Child Support \_\_\_ yes \_\_\_ no Amount \_\_\_\_\_

I certify the information provided above is true and complete.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Office use only: \_\_\_\_\_ date of IRS data match