Providing Income and Tax Information When Your FAFSA is Selected for Verification Award Year 2022-23

Students who complete the Free Application for Federal Student Aid (FAFSA) may be asked to provide income or tax documentation for themselves as well as their spouse and/or parents if selected for a review process known as Verification. Your FAFSA has been selected for this review and additional documentation is needed.
Depending on the filing status reported on your FAFSA application, it may be necessary to provide a Tax Return Transcript or a Non-Filing Verification Letter from the IRS. If applicable, these items may also be required for your spouse (if married) or parents (if considered "dependent" on your FASFA application).

Reported Filing Status: Already Completed or Will File
If you, your spouse or parents (if applicable) reported that they have already completed or will file their income tax return on the FAFSA, it is best to verify income and tax information by using the **IRS Data Retrieval Tool (IRS DRT)** that is part of FAFSA on the Web at studentaid.gov. In most cases, no further documentation is needed to verify income information that was transferred using the IRS DRT, so long as that information was not changed after it was imported. To be able to use the data retrieval tool, an income tax return must have already been processed by the IRS.

How to use the IRS DRT in FAFSA on the Web:

1. Go to studentaid.gov and log into your FAFSA record for the correct aid year
2. If updating a previously-submitted FAFSA, select "Make FAFSA Corrections"
3. Navigate to the Financial Information section of the FAFSA
4. In the Tax Information section(s), follow the instructions to determine eligibility to use the IRS DRT
5. If eligible, follow the directions to link to the IRS
6. Provide the filer's information used when filing (e.g., type in address as of when the return was filed)
7. Follow the instructions to transfer IRS income tax return information into the FAFSA

In the case you, your spouse or parents (if applicable) are unable to use the IRS DRT, choose not to use the IRS DRT or must change the information that is imported, a Tax Return Transcript must be provided.

Reported Filing Status: Will Not file
If you, your spouse or parents (if applicable) reported their filing status as will not file and are not required to file a tax return, a Non-Filing Verification Letter must be provided.

Obtaining a Tax Return Transcript or Non-Filing Verification Letter:
The IRS Tax Return Transcript or Non-Filing Verification Letter can be obtained from the IRS by telephone, online or by mail. Below are instructions on how to obtain this documentation.

- **Automated Telephone Request:** 1-800-908-9946
  - Provide the primary filer's Social Security Number, date of birth and address used when filing
- **Online Request**: https://www.irs.gov
  - On the IRS homepage, click "Get Your Tax Record"
  - Choose one option: "Get Transcript Online" or "Get Transcript by Mail"
  - Selecting "Get Transcript Online" will require you to create an account or log in
  - Provide the primary filer's Social Security Number, date of birth and address used when filing

    - Request the **“Return Transcript” or “Verification of Non-Filing Letter”** for tax year **2020**
- **<u>Paper Request Form</u>:** IRS Form 4506-T: Request for Transcript of Tax Return
    - Download IRS Form 4506-T at https://www.irs.gov/pub/irs-pdf/f4506t.pdf
    - Fill in top section of form line 1a to 5b
    - Line 6: Check the box for (a) Return Transcript or
    - Line 7: Check the box for Verification of Nonfiling
    - Line 9: Year or period requested, enter **“12/31/2020”**
    - Mail the completed form to the address indicated on page 2

Availability of Filing Information from the IRS:
In most cases, filers of electronic tax returns have information available within 2-3 weeks after those returns have been accepted by the IRS. For paper tax return filers, it may take 6-8 weeks for information to become available. Additional time may be required if income tax is owed.

Special Cases:

- If the student or parent made a mistake on the FAFSA (including tax filing status), log into studentaid.gov select “Make FAFSA Corrections,” and update as needed.

- If an **amended** (i.e., changed) IRS income tax return has been filed, provide <u>ALL</u> of the following:
    - a <u>signed</u> copy of the 2020 IRS Form 1040X “Amended US Individual Income Tax Return”
    - any/all associated schedules and forms for the 1040X –<u>OR</u>- replacement/updated 1040, if available
    - <u>one</u> of the following:
        - a <u>signed</u> copy of the 2020 IRS income tax return
        - IRS Tax Return Transcript
        - IRS DRT in FAFSA on the Web with all tax information from the original tax return

- Victims of **IRS tax-related identity theft** should provide a Tax Return Database View (TRDBV) transcript <u>AND</u> a signed & dated statement indicating that they were victims of IRS-tax related theft and the IRS is aware of the problem.
    - Contact the financial aid administrator at your college if you are unable to obtain the TRDBV.
    - Contact the IRS’ Identity Protection Specialized Unit at 1-800-908-4490 for more guidance as needed.

- **Contact the Financial Aid Office** at your college if any of the following applies to you:
    - The student and/or parents (if student is dependent) had a **change in marital status** since tax filing
    - **Married tax filers** (student or parent) **filed separately**
    - Individuals were **granted a filing extension by the IRS** beyond the automatic six-month extension
    - Student or parent (if student is considered dependent) **filed non-IRS income tax returns**

Please contact the Financial Aid Office at your college if you have any questions.