

## Verification of 2015 Income Information Required

### Individuals Who Completed a 2015 Tax Return

Option 1 – Data Retrieval: (no longer an option until further notice)

March 30, 2017

**The Department of Education announced that the Data Retrieval Tool on [fafsa.gov](http://fafsa.gov) will be unavailable until extra security protections can be added. While they are working to resolve the issues as quickly as possible students and families should plan for the tool to be offline for the foreseeable future.**

Option 2 – Request a Tax Return Transcript (still available)

Visit [IRS.gov](http://IRS.gov) – Under tools select option to “Get A Transcript”. You can use the get a transcript by mail or online. Please make sure you request a Return and not an Account Transcript (we cannot take account transcripts). You must then provide a copy of the Tax Return Transcript to the school.

Or call 1-800-908-9946 to request a transcript. The 1-800 number requires less info over the phone but it is hard to tell which transcript you are requesting; therefore, it is suggested you request both free ones so you are guaranteed to get the correct *Return* Transcript.

### Individuals Who Did not File a Tax Return

An individual who did not file a 2015 IRS income tax return must provide a letter of *Non-Filing Statement* from the IRS. An individual can get this one of two ways:

- 1) Visit [IRS.gov](http://IRS.gov) and utilize the “Get A Transcript Tool” Note: Only the request a Transcript Online will provide a Non-filing statement.
- 2) If you need to request a Non-Filing Statement via mail you must complete the IRS form 4506-T (available through [IRS.gov](http://IRS.gov)). The IRS will then mail to you the Non-Filing Statement letter and you must provide that to the school to satisfy this requirement. This form must be sent to the appropriate office depending on your State of residency.

### Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- 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 for tax year 2015;
- 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 for tax year 2015; **and**
- A copy of IRS Form W-2 for each source of employment income received for tax year 2015 and, if self-employed a signed statement; **and**
- A signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2015.

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

An individual who filed an amended IRS income tax return for tax year 2015 must provide:

- A **2015 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 the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

### **Individuals Who Were Victims of IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS by calling 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 (Form 14039)