Instructions for Income Information Required on the Verification Worksheet

If your application for financial aid has been selected for a review process called Verification, you must verify the income you reported on your financial aid application (FAFSA).

- **Preferred method to verify income:** Use the IRS Data Retrieval Tool to transfer student/spouse/parent(s) 2018 tax information onto the FAFSA.

- **Non-Tax filers (except students who reported parent information on the FAFSA):** Submit a Verification of Non-Filing letter from the IRS (see Page 2 "Non-Tax Filer Information"). If you (student/spouse) and/or parent worked in 2018 and earned income but did not file or was not required to file a tax return, please provide our office with copies of all 2018 W-2 Form(s).

- **U.S. Federal Income Tax Filers:** If student/spouse/parent is not able to use the IRS Data Retrieval, we can accept a 2018 IRS Tax Return Transcript (see page 2 on how to request for a Tax Return Transcript from the IRS).

- **Amended Federal Income Tax Filers:** IRS Data Retrieval to transfer the original 2018 tax information AND a signed copy of the 2018 Amended Tax Return (1040X), or a signed copy of the original 2018 Federal Tax Return AND signed copy of the 2018 Amended Tax Return (1040X).

- **Married Filing Separate or students/parents who recently got married:** If you/spouse/parent filed taxes as Married Filing Separate or if you/spouse/parent recently got married, the IRS Data Retrieval will not work. You will need to look at both tax return forms (for yourself and spouse/for parent and stepparent), add up the information requested and input the correct amounts on the appropriate lines of the FAFSA.

The following are ways to verify your income information:

IRS Data Retrieval Tool

The recommended way to verify income is by using the IRS Data Retrieval Tool that is a part of the FAFSA application on the web. This feature can be used only if you filed a 2018 Federal Income Tax Return. Please follow the instructions below to link your (and your spouse (if married) and your parents (if parent information is needed) 2018 tax information directly onto your FAFSA:

- Go to www.fafsa.gov
- Log onto your FAFSA application by inputting your (Student's) FSA ID (username and password)
- Select "*Make FAFSA Correction*"
- Input your *SAVE* Key
- On the top, look for and click on the tab labeled "*Finances*"
- You will need to answer questions such as "Did you file a 2018 Federal Income Tax Return," "*What was your Tax Filing Status*," "*Did you file a Puerto Rican or foreign Tax Return*?" After answering all those questions, you will see a text box that says you may be eligible to use the IRS Data Retrieval Tool…..click on the bar labeled "*Click here to Proceed*"
- Click the "OK" button
- At the IRS Database site, input the mailing address that appears on your 2018 Tax Return (exactly as typed on your 2018 tax return)
- Click the "Submit" button at the bottom and another text box will appear to say a match was found and if you want to transfer the information to the FAFSA, click on the box that is labeled "*Transfer Now*"
- You will be redirected back to your FAFSA application and will notice that all the relevant tax information says "*Transferred from the IRS*"
- Continue to the last page of your FAFSA. Input parent's FSA ID if needed and requested and submit your FAFSA by clicking on "*Submit my FAFSA Now.*"

Those who are NOT ABLE to utilize the Data Retrieval Tool are

- Individuals granted a tax filing extension by the IRS
- Individuals who were victims of IRS identity theft
- Individuals who are married but filed a tax return Separately
- Individuals who filed a foreign income tax return
- Individual who filed an electronic tax return within two weeks or filed a paper IRS tax return within eleven weeks

Please see Page 2 for IRS Tax Return Transcript Information and Instructions

Instructions for Obtaining Income Information

If you have been selected for verification, you must verify the income you reported on your financial aid application (FAFSA). The following are ways to verify your income information:

Request an IRS Tax Return Transcript

You will need your Social Security Number (SSN), date of birth, and the address on file with the IRS (normally this will be the address used when your **2018** IRS tax return was filed).

To obtain an IRS tax return transcript:

Online Request Get Transcript ONLINE	Online Request Get Transcript by MAIL	Telephone Request
- Go to: www.irs.gov - At the IRS homepage click "**Get Your Tax Record**" - Click "**Get Transcript ONLINE**" - The tax filer **must sign up to create or reactivate his or her account**. The user must have (1) access to a valid email address, (2) a text-enabled mobile phone and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). - Follow the prompts to request a **Tax Return Transcript**.	- Go to: www.irs.gov - At the IRS homepage click "**Get Your Tax Record**" - Click "**Get Transcript by MAIL**" - Acknowledge the disclosure pop up box that appears by clicking "**OK**" - Complete the required fields (SSN, DOB etc.) and then click "**Continue**" - In the *Type of Transcript* field, select "**Tax Return Transcript**" - In the *Tax Year* field, select the **year** you need for your file - Click "**Continue**"	- Available from the IRS by calling **1-800-908-9946** - To continue in English press 1. - Tax filers must follow prompts to enter their **Social Security number** *and* **the numbers in their street address** - Select "**Option 2**" to request an *IRS Tax Return Transcript* *E*nter the **year** desired

Non-U.S. Tax Filer Income Information

If the student and/or spouse or parent(s) filed a **2018** tax document with either a U.S. Territory (Guam, American Samoa, U.S. Virgin Islands) or Commonwealth (Puerto Rico and the Northern Mariana Islands), please contact the relevant taxing authority to obtain a copy of the **2018** transcript.

If unable to attach copy of transcript, a copy of the signed tax document with proof of fees charged for request of an official transcript is also acceptable.

Non-Tax Filer Information (for those who did not file a U.S. Income Tax Return)

ALL non-tax filers, except students who had to provide parent information on the FAFSA, must provide confirmation of non-tax filling if a tax return was not filed and was not required to be filed. If income was earned in **2018** (even though a 2018 tax return was not filed) the student must also attach appropriate documentation (W-2/wage statements for 2018).

If W-2/wage statements are not available, IRS Wage and Income transcripts are also an acceptable form of income verification. To obtain a **Wage and Income Transcript and/or Verification of Non-Tax Filing:**

Online Request - Get Transcript ONLINE	Get W-2 Form(s) or Non-Filing Letter by MAIL
- Go to: www.irs.gov - At the IRS homepage click "**Get My Tax Record**" - The tax filer **must sign up to create or reactivate his or her account**. The user must have (1) access to a valid email address, (2) a text-enabled mobile phone and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). - Follow the prompts to request a **Wage & Income Transcript**.	- Complete FORM 4506-T and select item **7** for verification of nontax filing and/or **8** for W-2 (Wage & Income) Transcript**.** - Follow instructions, complete the form, sign date and either Fax or mail the completed form to the IRS.

If no income was earned in **2018**, enter "**0**" on the verification worksheet.