

# How to Verify Federal Income Tax Information

For regular tax files, there are two ways to verify federal income tax information. Please see reverse side for individuals with unusual circumstances.

## 1. IRS Data Retrieval Tool

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, follow these instructions:

- Go to [www.FAFSA.ed.gov](http://www.FAFSA.ed.gov)
- Log in to your FAFSA record
- Select “Make FAFSA Corrections,” and navigate to the “Financial Information” section of the form.
- Click **Link to IRS**
- Your FAFSA will be saved and you will be transferred to the IRS Web site.
- On the IRS Web site, enter the requested information. These questions will validate the proper tax information for retrieval and must be entered exactly as it appears on your 2014 Federal income Tax Return.
- Once the IRS has validated your identification, your tax information will display.
- You can either transfer your information from the IRS, or choose to return to FAFSA on the Web from the IRS Web site. If you do not transfer your information or choose not to return from the IRS Web site, you will have to login to open your saved FAFSA.
- If you transfer your IRS tax information, questions that are populated with tax information will be marked with “Transferred from the IRS.”

**Note:** It takes up 2-3 weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and 8-11 weeks for paper IRS tax return filers.

A **2014 IRS Tax Return Transcript** may be obtained through the:

- Online Request - Go to [www.IRS.gov](http://www.IRS.gov), under the Tools heading on the IRS homepage, click “Get Transcript of Your Tax Records.” Click “Get Transcript ONLINE” or “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- IRS2Go App – Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>  
Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8–11 weeks after the 2014 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the student and spouse filed separate 2014 IRS income tax returns, **2014 IRS Tax Return Transcripts** must be provided for each.

# Verification of 2014 Income Information for Individuals with Unusual Circumstances

## Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2014 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- 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 2014;
- 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 2014; **and**
- A copy of IRS Form W-2 for each source of employment income received for tax year 2014 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2014.

## Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2014, provide both of the following:

- A signed copy of the original 2014 IRS income tax return that was filed with the IRS or a **2014 IRS Tax Return Transcript**; **and**
- A signed copy of the 2014 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

## Individuals Who Were Victims of Tax Administration Identity Theft

- A victim of tax administration identity theft who is not able to obtain a **2014 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2014 IRS income tax return information.

## Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2014 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide:
  - A signed copy of that 2014 income tax return(s); **or**
  - A transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for tax year 2014.