



INSTRUCTIONS FOR FEDERAL INCOME TAX VERIFICATION

The Department of Education has made significant changes to the verification process for the 2012-2013 academic year. Beginning with the 2012-13 academic year, financial aid offices are no longer permitted to accept signed copies of federal tax returns from students and parents for verification purposes.

If selected for verification, a student and/or parent must submit a IRS tax transcript unless they are able to import the tax data onto the FAFSA using the IRS Data Retrieval Process. To import the federal income tax data using the IRS Data Retrieval Process go to FAFSA on the Web (FOTW) and update the FAFSA. Federal income tax data imported through the IRS Data Retrieval Process must be unaltered to satisfy the verification requirement. The IRS Data Retrieval Process is considered the fastest, easiest, and most secure method of providing your federal income tax data.

Certain applicants are unable to use the IRS Data Retrieval Process when completing FOTW. For example, if a married applicant filed separately from their spouse (tax status of "Married filing separately"), they would be ineligible to use the IRS Data Retrieval Process. Those students and/or parents who are ineligible to import data into their FAFSA or choose not to exercise that option will be required to submit an IRS Tax Return Transcript.

Instructions for requesting an IRS Tax Return Transcript is located on the following pages. The Department of Education no longer recognizes copies of a Federal Tax Return as acceptable verification of tax data; therefore, please do not submit copies of your Federal Income Tax Return to our office.

AMENDED TAX RETURNS

The FAFSA on the Web IRS Data Retrieval Process will only transfer information from an original tax return and not from an amended tax return. Similarly, the IRS Tax Return Transcript only includes information from the original tax return. Therefore, **both an IRS Tax Return Transcript and a signed copy of IRS Form 1040X (Amended U.S. Individual Income Tax Return) must be submitted to the Office of Financial Aid for verification when an amended return was filed.**

Mail form to: LLU Office of Financial Aid, 11139 Anderson St., Loma Linda, CA 92350, or Fax to: (909)558-4283

If you have any questions please email Finaid@llu.edu or call (909) 558-4509



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IRS TAX RETURN TRANSCRIPT REQUEST PROCESS

AID YEAR: 14/15

Tax filers can request, free of charge, a transcript of their 2013 tax return from the IRS in one of three ways.

Online Request

- Available on the IRS web site at www.irs.gov
- In the search box of the homepage type "Order a Transcript"
- Click "Order a Transcript"
- Click "Order a Transcript" (under option #3)
- Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click "Continue"
- In the Type of Transcript field, select "Return Transcript" and in the Tax Year field, select "2013".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

Telephone Request

- Available from the IRS by calling 1-800-908-9946
- Tax filers must follow prompts to enter their Social Security Number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter "2013".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

Paper Request Form-IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used, instead of IRS Form 4506-T
- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1-4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- On line 6, enter "2013" to receive IRS tax information for the 2013 tax year that is required for the 2014-2015 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

If you have any questions please email Finaid@llu.edu or call (909) 558-4509

LOMA LINDA UNIVERSITY