

## Tax Information Sheet

When verifying your FAFSA, we may be required to review your tax returns. Not sure if you are required to file taxes? Use the calculator on the IRS website <http://www.irs.gov/uac/Do-I-Need-to-File-a-Tax-Return?>.

To document your tax return, you may do one of the following:

- Use the IRS Data Retrieval Tool to transfer tax data to your FAFSA , **OR**
- Provide an IRS Tax Return Transcript

## IRS Data Retrieval Tool

If you did not use the IRS Data Retrieval Tool when you filed your FAFSA, you may still do so.

1. Login at [fafsa.gov](http://fafsa.gov) to “Make FAFSA Corrections”
2. On the FAFSA, in the Financial Information section, click “Link to IRS”
3. On the IRS website, fill out the form and click on “Transfer my tax information into the FAFSA”

**You will be unable to use IRS Data Retrieval Tool if:**

- *Your marital status changed after December 31*
- *You filed an amended return (See Tax Transcript below)*
- *You filed married filing separately*
- *You filed a tax return using a Tax ID Number (TIN)*
- *You filed a foreign tax return - Submit a signed copy of your return to the financial aid office*
- *The home address on the FAFSA does not match the address on the tax return*

Note: Tax information electronically filed within the last 2 weeks or submitted by mail within the last 8 weeks may not be available.

The screenshot shows the 'Parent Financial Information' section of the FAFSA application. At the top, there are navigation tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, and Financial Information. The 'Parent Financial Information' tab is active. Below the tabs, there is a blue header for 'Parent Financial Information'. A message box with an information icon states: 'You said that your parents are married/remarried but you also said that your parents' tax return filing status is head of household. If one of your responses is incorrect, change it now. If the information you entered is correct, make sure that the income information you provide on the following pages reflects both your parents' 2013 income.' Below this, a green checkmark icon indicates 'Application was successfully saved.' There are two dropdown menus: 'For 2013, have your parents completed their IRS income tax return or another tax return?' with 'Already completed' selected, and 'For 2013, what is your parents' tax filing status according to their tax return?' with 'Married-Filed Joint Return' selected. A message box with a grid icon states: 'You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.' Below this are three questions with radio button options: 'Did you, the parents, file an amended tax return?' (No selected), 'Did you, the parents, file a Puerto Rican or foreign tax return?' (No selected), and 'Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?' (No selected). A recommendation box states: 'Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA.' Below this is a form to enter a PIN and click 'Link To IRS'. It asks 'Which parent are you?' with 'Father/stepfather' selected. There is a PIN input field with four dots and two links: 'Apply For A PIN' and 'I Forgot/Don't Know My PIN'. At the bottom is a 'LINK TO IRS' button.

## IRS Tax Transcript

If you are selected for verification of your FAFSA, and are unable to use the IRS Data Retrieval Tool, you must submit an official [IRS TAX RETURN TRANSCRIPT](#), (not an Account Transcript.) There are multiple ways to do this:

Request a transcript electronically on the IRS website at <http://www.irs.gov/Individuals/Get-Transcript>

Select to receive your transcript online (immediate) or by mail (5-10 business days)

**Get Transcript ONLINE**

- View and print your transcript immediately.
- Choose among [Tax Return](#), [Tax Account](#), [Record of Account](#), or [Wage and Income](#) transcripts or a [Verification of Nonfiling Letter](#).
- Need help? [More information about Get Transcript Online](#).

**Get Transcript by MAIL**

- Transcripts arrive in 5 to 10 business days.
- Choose from either a [Tax Return](#) or [Tax Account](#).
- Transcript by Mail is available [en Español](#).

• **ONILNE TRANSCRIPT REQUEST**

- Select "Create An Account"
- Enter the name, filing status, and address that was used on your last tax return
- Answer the presented questions (some may ask about mortgages, auto loans, etc.)
- Create a site name and choose a picture. Create 4 security questions, a username, and a password
- Select "Income Verification" for your reason and the "Return Transcript" will be highlighted. Select the year.

- Make sure **your pop-up blocker is turned off** and your transcript will appear in a new tab in your browser.

**Get Transcript**

Please select the reason you are requesting a transcript to help us determine the appropriate transcript for your needs.

<input type="radio"/> Higher Education/Student Aid	<input type="radio"/> FEMA/Disaster Related	<input type="radio"/> State or Local Tax Issue
<input type="radio"/> Mortgage Related	<input type="radio"/> State Licensing	<input checked="" type="radio"/> Income Verification
<input type="radio"/> Federal Tax	<input type="radio"/> Small Business Loan	<input type="radio"/> Health Care
<input type="radio"/> Immigration	<input type="radio"/> Housing Assistance	<input type="radio"/> Other

You selected: **Income Verification**  
We suggest you download: **Return Transcript**

Below are the transcripts and years available.

Return Transcript				Record of Account Transcript			
<a href="#">2013*</a>	<a href="#">2012</a>	<a href="#">2011</a>	<a href="#">2010</a>	N/A	<a href="#">2012</a>	<a href="#">2011</a>	<a href="#">2010</a>

• **MAIL TRANSCRIPT REQUEST**

- Enter the required information (SSN, DOB, street address, and zip code)
- **Then select "Return Transcript"**

- **Or you may CALL the IRS** at 1-800-908-9946 and follow the prompts to request a Tax Return Transcript **Or you may file [Form 4506T-EZ](#)**
- **If you filed an Amended Return:**
  - Submit both an IRS Tax "Return Transcript" and an IRS Tax "Account Transcript," **OR**
  - Submit the Record of Account, (using IRS Form [4506-T](#)), which could take up to 30 days

**IMPORTANT DOCUMENT NOTE:** If you are applying for aid at other schools, please make a copy of your tax transcript for your records before you submit it to a school.