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
- 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 <u>must be</u> entered <u>exactly</u> as it appears on
 your 2013 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.

2. IRS Tax Transcript

To obtain a **2013 IRS Tax Return Transcript**, follow these instructions:

- Go to <u>www.IRS.gov</u> and click on the "Order a Return or Account Transcript" link. Make sure to request the "IRS Tax Return Transcript" and <u>not</u> the "IRS Tax Account Transcript."
- Use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2013 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2013 IRS income tax return).

In most cases, for electronic filers, a **2013 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2013 IRS income tax return has been accepted by the IRS. Generally, for filers of 2013 paper IRS income tax returns, the **2013 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2013 paper IRS income tax return has been received by the IRS.

Verification of 2013 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2013 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 2013;
- 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 2013; and
- A copy of IRS Form W–2 for each source of employment income received for tax year 2013 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 2013.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2013, provide both of the following:

- A signed copy of the original 2013 IRS income tax return that was filed with the IRS or a **2013 IRS Tax Return Transcript** or the 2013 tax year; and
- A signed copy of the 2013 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who is not able to obtain a 2013 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 2013 IRS income
tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

 An individual filed or will file a 2013 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 2013 income tax return(s).