## **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 2011 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 to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

### 2. IRS Tax Transcript

To obtain a transcript you will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

You may obtain an IRS tax return transcript either online, phone or paper request.

- Online go to <u>www.IRS.gov</u> and click on the "Order a Return or Account Transcript" link
- Call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript."
- Complete and submit IRS Form 4506T-EZ available for download on the IRS website

# Verification of 2012 IRS Income Tax Return Information for Individuals with Unusual Circumstances

## **Granted a Filing Extension by the IRS**

If an individual is required to file a 2012 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of the 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 2012; and
- A copy of IRS Form W–2 for each source of employment income received for tax year 2012 and, if self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2012.

#### Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2012, provide both of the following:

- A signed copy of the original 2012 IRS income tax return that was filed with the IRS or a 2012 IRS
   Tax Return Transcript (signature not required) for the 2012 tax year; and
- A signed copy of the 2012 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

### **Victims of IRS Identity Theft**

A victim of IRS identity theft who has been unable to obtain a **2012 IRS Tax Return Transcript** or use the IRS DRT must provide a signed copy of the 2012 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 "Identity Theft Affidavit" if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him or her to submit one, he or she may provide one of the following:

- A statement signed and dated by the individual indicating that he or she was a victim of IRS
  identity theft and that the IRS is investigating the matter. The statement must also indicate that the
  individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he or she was
  not required to file the form; or
- A copy of a police report if it was filed related to the IRS identify theft.

#### Filed Non-IRS Income Tax Returns

If an individual filed or will file a 2012 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, provide a signed copy of that 2012 income tax return(s).