

INSTRUCTIONS FOR VERIFYING 2019 TAX INFORMATION

Choose one of these three options:

- **update FAFSA with IRS Data Retrieval Tool (IRS DRT)**
- **order a copy of your Tax Return Transcript from the IRS**
- **send a signed copy of IRS Form 1040 and all Schedules filed with the Form 1040**

- **Update FAFSA using IRS Data Retrieval Tool (DRT)**

The best way to verify income is by using the **IRS Data Retrieval Tool (DRT)** that is part of the FAFSA on the Web.

1. Go to www.fafsa.gov
2. Log in and select "[Make FAFSA Corrections](#)"
3. In the Financial Information section of the form, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2019 IRS income tax information into your FAFSA

The Financial Aid Office will receive a copy of your updated FAFSA within 3-5 business days. You do not need to order the IRS Tax Return Transcript if you are able to update your tax information using the IRS DRT. You should be able to use the IRS DRT within 2-3 weeks after filing your return.

OR

- **Order IRS Tax Return Transcript**

To request an IRS tax return transcript:

1. Go to www.IRS.gov
 2. Select "Get Your Tax Record"
 3. Select one option -
 - "Get Transcript Online"
 - Need to create an account
 - To create account, you will need to be able to verify your identity with one of the items listed below.
If you do not have any of these items you will not be able to create an account and receive the transcript online.
 - Credit Card OR
 - Mortgage or Home Equity Loan OR
 - Home Equity Line of Credit OR
 - Auto Loan
 - "Get Transcript by Mail"
 - Enter requested information
 - You must enter the address **exactly** as it appeared on your 2019 IRS Form 1040
 - Type of Transcript – select "Return Transcript"
 - Tax Year – enter year 2019
 - Tax transcripts will be mailed to the address on the tax return within 5-10 days.
 4. Forward a copy of **all pages** of the 2019 IRS Tax Return Transcript to the Financial Aid Office.
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In **most** cases, for electronic filers, a 2019 IRS Tax Return Transcript is available from the IRS within 2-3 weeks after filing. If you filed a paper return, expect 8-11 weeks for your transcript to be available.

Tax Return Transcripts usually print on both sides of each page of the transcript. If you are FAXing or scanning the transcript to our office, please make sure that you FAX or scan both the front and back side of every page.

OR

- Submit a **signed** copy of your 2019 IRS Form 1040 along with any Schedules that were filed with the Form 1040.
- You must sign on the signature line in the “Sign Here” section on page 2 of the Form 1040, even if you submitted your tax documents electronically.
- Federal regulations do not allow us to accept unsigned copies.

Special Situations:

Amended Returns - If you filed an amended tax return (Form 1040X), you must submit:

- a 2019 IRS Tax Return Transcript or a **signed** copy of your original 2019 Form 1040 and Schedules **AND**
- a **signed** copy of both pages of your Form 1040-X (Amended U.S. Individual Income Tax Return)

Victims of IRS Identity Theft – A victim of IRS tax-related identity theft must provide a 2019 Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript that includes all of the income and tax information required to be verified **AND** a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax related identity theft. (NOTE: This only applies to victims of IRS tax-related identity theft and does not apply to other types of identity theft.)

Filing Extensions - An individual who has been granted a filing extension by the IRS must provide the following:

- Copy of IRS 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return”.
- Copy of the IRS’s approval of an extension,
- Copy of the W-2 for each source of employment income received for the 2019 tax year 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 the 2019 tax year.