

## 2018-19 Instructions for Income Information Required on the Verification Worksheet

If you have been selected for verification, you must verify the income you reported on your financial aid application (FAFSA). **New for the 2018-2019 academic year: Non-filers; except students who had to provide parent information on the FAFSA, must also provide documentation to verify their non-filing status.** The following are ways to verify your income information:

### IRS Data Retrieval

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. This feature can be used only if you filed a 2016 Federal Income Tax Return.

Those who are **NOT ABLE** to use the IRS Data Retrieval are:

- Individuals granted a filing extension by the IRS;
- Individuals who were victims of IRS identity theft;
- Individuals who are married but filed separately;
- Individuals who filed as Head of Household;
- Individuals who filed a foreign income tax return; and
- Individual who filed electronically within three weeks or filed a paper IRS tax return within eleven weeks.

If you filed an amended 2016 tax return (Form 1040X), you must also provide a copy of the signed amended tax return or IRS Record of Account Transcript **AND** a copy of the IRS Tax Return Transcript for 2016 to the financial aid office.

### Request an IRS Tax Return Transcript

You will need your Social Security Number (SSN), date of birth, email, tax filing status and the address on file with the IRS (this will be the address used when your 2016 IRS tax return was filed).

To obtain an IRS tax return transcript:

Online Request Get Transcript ONLINE	Online Request Get Transcript by MAIL	Telephone Request
<ol style="list-style-type: none"> <li>1) Go to <a href="http://www.irs.gov">www.irs.gov</a></li> <li>2) Click “<b>Get My Tax Record</b>”</li> <li>3) Click “<b>Get Transcript ONLINE</b>”</li> <li>4) The tax filer <b>must sign up to create or reactivate his or her account.</b> The user must have (1) access to a valid email address, (2) a text-enabled mobile phone (your name must be associated with the account) and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan).</li> <li>5) Follow the prompts to request a “<b>Return Transcript</b>”</li> </ol>	<ol style="list-style-type: none"> <li>1) Go to <a href="http://www.irs.gov">www.irs.gov</a></li> <li>2) Click “<b>Get My Tax Record</b>”</li> <li>3) Click “<b>Get Transcript by MAIL</b>”</li> <li>4) Acknowledge the disclosure pop up box that appears by clicking “<b>OK</b>”</li> <li>5) Complete the required fields (SSN, DOB etc.) and then click “<b>Continue</b>”</li> <li>6) In the <i>Type of Transcript</i> field, select “<b>Return Transcript</b>”</li> <li>7) In the <i>Tax Year</i> field, select the <b>year</b> you need for your file</li> <li>8) Click “<b>Continue</b>”</li> </ol>	<ol style="list-style-type: none"> <li>1) Available from the IRS by calling <b>1-800-908-9946</b></li> <li>2) To continue in English press 1</li> <li>3) Tax filers must follow prompts to enter their <b>Social Security number and the numbers in their street address</b></li> <li>4) Select “<b>Option 2</b>” to request an <i>IRS Tax Return Transcript</i></li> <li>5) Enter the <b>year</b> desired</li> </ol>

### Confirmation of Non-Filing Status – New for 2018-2019

ALL tax non-filers, except students who had to provide parent information on the FAFSA, must provide confirmation of non-filing if a tax return was not filed and was not required to be filed. A confirmation of non-filing can be obtained from:

Online Request Get Transcript ONLINE	Online Request Get Transcript by MAIL	Telephone Request
<ol style="list-style-type: none"> <li>1) Follow Steps 1 – 4 above</li> <li>2) Follow the prompts to request a “<b>Verification of Non-filing Letter</b>”</li> </ol>	<ol style="list-style-type: none"> <li>1) Follow Steps 1 – 5 above</li> <li>2) In the <i>Type of Transcript</i> field, select “<b>Verification of Non-filing Letter</b>”</li> <li>3) In the <i>Tax Year</i> field, select the <b>year</b> you need for your file</li> <li>4) Click “<b>Continue</b>”</li> </ol>	<ol style="list-style-type: none"> <li>1) Follow Steps 1 – 3 above</li> <li>2) Select “<b>Option 2</b>” to request an <i>IRS Verification of Non-filing Letter</i></li> <li>3) Enter the <b>year</b> desired</li> </ol>