

Your application for Federal Student Aid was selected for review in a process called "Verification." Provide documentation needed to complete this verification process as soon as possible so that your financial aid will not be delayed. Please be aware that your financial aid eligibility may change based on verification.

Important Note: The instructions below apply to the student as well as each parent included in the household for a dependent student, or if the student is married, the student's spouse. Notify the financial aid office if the parents or student and spouse filed separate IRS income tax returns for 2012, did not file IRS income tax returns for 2012, or had a change in marital status after the end of the 2012 tax year on December 31, 2012.

Instructions: *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2012 IRS income tax return information that was transferred directly into the student's FAFSA using the IRS DRT if that information was not changed. Schools are no longer permitted to accept personal copies of federal tax returns to satisfy verification requirements. **If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using the tool as it provides you with the fastest, easiest, and most secure solution for meeting verification requirements for tax information.**

For most electronic filers, 2012 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2012 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2012 paper IRS income tax returns, the 2012 IRS income tax return information is available for the IRS DRT within 8–11 weeks after the 2012 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

If tax filers are unable or choose not to use the IRS DRT in FAFSA on the Web, you must instead provide the school with 2012 IRS Tax Return Transcript(s).

To obtain a **2012 IRS Tax Return Transcript**, go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." Use the Social Security Number and date of birth of the first person listed on the 2012 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2012 IRS income tax return). In most cases, for electronic filers, a **2012 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2012 IRS income tax return has been accepted by the IRS. Generally, for filers of 2012 paper IRS income tax returns, the **2012 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2012 paper IRS income tax return has been received by the IRS.

If the parents or student and spouse filed separate 2012 IRS income tax returns, **2012 IRS Tax Return Transcripts** must be provided for each individual.

IRS DATA RETRIEVAL TOOL

If a student has already submitted their FAFSA without using the IRS Data Retrieval Tool, they can make a correction to their FAFSA and use this tool. If you need additional assistance please call the Federal Student Aid Information Center at **1-800-4-FED-AID (1-800-433-3243)**

1. Log on to www.fafsa.ed.gov and click on Make FAFSA Corrections.
2. Enter PIN & password.
3. Click on Financial Information tab.
4. **If you are a dependent student whose parent(s) filed taxes:**
 - a. Under "Parent Financial Information" (question 79, "Parents Filed 2011 Income Tax Return?"), select "already completed" and complete the checklist below to determine if you can use the IRS Data Retrieval Tool. If, based on your responses, you can transfer IRS information to the FAFSA, a parent must enter his/her PIN and click "Link to IRS." *If this option does not appear, then you must order a transcript.*
 - b. A page will display notifying you that you are leaving the FAFSA website. Click "OK" to continue. You will automatically be redirected to the IRS.gov "Get My Federal Income Tax Information" web page.
 - c. Your parent will enter all requested information as it appears on tax return and click "Submit."

- d. The following page will display tax information for use on the FAFSA. Check the box next to "Transfer my Tax Information to the FAFSA" and click "Transfer Now," then return to the FAFSA website by choosing "OK".
5. **If you (the student) filed taxes:**
 - a. Proceed to the Student Tax Information, select "already completed" in response to the question regarding your tax completion status and complete the checklist that appears below to determine if you can use the IRS Data Retrieval Tool. If, based on your responses, you can transfer IRS information to the FAFSA, enter your pin and click "Link to IRS." *If this option does not appear, then you must order a transcript.*
 - b. A page will display notifying you that you are leaving the FAFSA website. Click "OK" to continue. You will automatically be redirected to the IRS.gov "Get My Federal Income Tax Information" web page.
 - c. Enter all requested information as it appears on tax return and click "Submit."
 - d. The following page will display tax information for use on the FAFSA. Check the box next to "Transfer my Tax Information to the FAFSA" and click "Transfer Now," then exit the IRS website and return to your FAFSA using the buttons provided.
6. After retrieving tax information, continue to the "Sign & Submit" section of the FAFSA and sign with PIN number for student and parent if applicable, then submit your corrected FAFSA. ***You are not finished until you have successfully signed and submitted your FAFSA and received a confirmation number.***

2012 IRS Income Tax Return Information for Individuals with Unusual Circumstances

Verification of 2012 IRS Income Tax Return Information for Individuals 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.

Verification of 2012 IRS Income Tax Return Information for Individuals Who 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.

Verification of 2012 IRS Income Tax Return Information for Individuals Who Were 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.

Verification of 2012 Income Tax Return Information for Individuals Who 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).