

# 2019-2020 IRS Tax Filer Verification Instructions



## Office of Scholarships and Financial Assistance

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Your 2019-2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. We are required to verify your 2017 Federal tax information (and spouse, if married) and/or your parent(s) 2017 Federal tax information (if dependent). Please review options for providing this information to our office and utilize the option most comfortable to you and/or your parents.

### Option 1 - IRS Data Retrieval Tool (DRT) - preferred and quickest option

- Log into your FAFSA at [fafsa.ed.gov](https://fafsa.ed.gov)
- Select 'Make FAFSA Corrections'
- Navigate to the student and/or parent 'Financial Information' tab
- If you qualify to use the IRS DRT, enter your FSA ID and select 'Link To IRS'. Select 'Proceed to the IRS Site'
- Once on the IRS website, enter all of your information correctly. Select 'Submit'
- Select 'Transfer My Tax Information into the FAFSA' and select 'Transfer Now'
- Make sure to sign and submit your FAFSA at the end of the application

### Option 2 - Submit a signed copy of your IRS Tax Return (Form 1040, 1040A or 1040EZ)

Obtain a **signed** copy of your IRS Form 1040 tax return that was either self-prepared (paper filed or online self-preparation service) or prepared by a tax professional.

- If married, both persons listed on the return must sign and date the return.
- If a tax professional was used to prepare this return, the preparer's name, address and Preparer Tax Identification Number (PTIN) must be on the form.

### Option 3 - Submit a copy of your IRS Tax Return Transcript

There are three ways to request a Tax Return Transcript directly from the IRS. Use one of the options to request the transcript. Once you receive the transcript from the IRS, send a copy to our office.

- Visit the IRS website at [irs.gov/Individuals/Get-Transcript](https://irs.gov/Individuals/Get-Transcript) and select 'Get Transcript by **MAIL**'. You will enter your identifying information and the IRS will mail your Tax Return Transcript in 5 to 10 business days to the address on your tax form. For 'Type of Transcript', select '**Tax Return Transcript**'. Do not select 'Tax Account Transcript'. For 'Tax Year', select '2017'.
- Call the IRS automated number (800)-908-9946. Provide your identifying information and the IRS will mail your Tax Return Transcript in 5 to 10 business days to the address on your tax form.
- Print and complete IRS Form 4506T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> and mail or fax the form directly to the IRS. Requests using this option are usually processed in 7 to 10 business days. This would be the option to use if your mailing address has changed from the address on your federal income tax form.
  - In Box 5b of this form, please include your student's 919# to ensure our office can match the transcript received to the correct student record

If you are having trouble obtaining a copy of your tax return transcript, you can contact your local IRS Taxpayer Advocate. For the phone number, visit <https://www.irs.gov/advocate/local-taxpayer-advocate> and select the state you filed in to locate the appropriate phone number.