

About the IRS Data Retrieval Tool:

The Department of Education is encouraging all FAFSA filers to use the IRS Data Retrieval Tool to complete the tax return information on the FAFSA in 2013-2014. The IRS Data Retrieval Tool is available for those who qualify at www.fafsa.gov about 2 weeks after electronically filing your 2012 tax return or 8 weeks if filing by paper.

You cannot use the IRS Data Retrieval Tool if any of the following apply:

- Individual filed a joint tax return but now is separated, divorced, widowed or married to another individual.
- Individual is married but filed a separate tax return from their spouse.
- Individual was granted a filing extension from the IRS. (See back for required documentation)
- Individual did not file a tax return.
- Individual used the IRS Data Retrieval Tool, but needed to change the information.

If you utilize the IRS Data Retrieval Tool, and do not make any changes to the information, tax return transcripts are not required. If you cannot use the IRS Data Retrieval tool and you filed a tax return, you must submit a Tax Return Transcript.

Tax return transcripts can be requested from the IRS online at www.irs.gov or by calling (800)908-9946.

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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 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).

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.