

About the IRS Data Retrieval Tool/FAFSA IRS Link:

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 2016-2017. The IRS Data Retrieval Tool is available for those who qualify at www.fafsa.gov about two weeks after electronically filing your 2015 tax return or eight 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.
- Parents are not married, but living together (both parents must submit a tax return transcript).
- Parents do not have social security numbers (used Tax Payer ID Number [ITIN]).
- Individual was granted a filing extension from the IRS. (See back for required documentation)
- Individual amended their tax return (filed a 1040X) after initially filing. (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 an IRS Tax Return Transcript.** IRS tax return transcripts can be requested from the IRS online at www.irs.gov or by calling (800)908-9946.

WARNER PACIFIC COLLEGE OFFICE OF FINANCIAL AID

2219 SE 68th Avenue · Portland, OR 97215 503.517.1000 warnerpacific.edu/financialaid

Verification of 2015 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of 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 2015;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2015; **and**
- A copy of IRS Form W-2 for each source of employment income received for tax year 2015 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 tax year 2015.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2015, provide both of the following:

- A **2015 IRS Tax Return Transcript** (that will only include information from the original tax return) for the 2015 tax year; **and**
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) 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.

Individuals Who Filed Non-IRS Income Tax Returns

An individual who filed or will file a 2015 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, or with a foreign central government must provide:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer's income and tax information required to be verified for tax year 2015; **or**
- If a transcript can not be obtained at no cost from the relevant taxing authority, a signed copy of the 2015 income tax return(s).