

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 2017-2018. 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 used the IRS Data Retrieval Tool, but needed to change the information.
- Individual did not file a tax return. (Submit IRS Verification of Non-Filing)

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. *If you did not file a tax return, you must submit IRS Verification of Non-Filing (Form 4506-T).*

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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;
- A Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2016;

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

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.