

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 2014-2015. The IRS Data Retrieval Tool is available for those who qualify at www.fafsa.gov about 2 weeks after electronically filing your 2013 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.

WARNER PACIFIC COLLEGE
OFFICE OF STUDENT FINANCIAL SERVICES

2219 SE 68th Avenue · Portland, OR 97215

☎ 503.517.1091 📠 503.517.1352 🌐 warnerpacific.edu

Verification of 2013 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2013 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 2013;
- 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 2013; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2013 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 2013.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2013, provide both of the following:

- A signed copy of the original 2013 IRS income tax return that was filed with the IRS or a **2013 IRS Tax Return Transcript** or the 2013 tax year; and
- A signed copy of the 2013 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft

- A victim of IRS identity theft who is not able to obtain a **2013 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2013 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2013 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, must provide a signed copy of that 2013 income tax return(s).