**** **Verification Process Options**

**Option 1: The IRS Data Retrieval Tool- Try this option first. It’s faster and easier.**

* Log into your 2020-2021 FAFSA and click on ***Make FAFSA corrections***. You will need your FSA ID and password to navigate to the ***Financial Information*** section.
* **Dependent Student:** When asked if the student’s parent(s) have completed a 2018 tax return, update the response to **“Already completed”**.
  + **Independent Student:** When asked if the student has completed a 2018 tax return, update the response to **“Already completed”.**
* The next questions will determine your eligibility to use the IRS Date Retrieval tool. If you can answer “No” to all of them, you should be able to proceed to the IRS website to transfer your information.
* It is important to enter your data exactly as it is printed on your **2018 Federal Tax Return**.
* Once you have successfully retrieved your information, you will need to click **Transfer Now** and then return to the FAFSA website.
* Repeat the same steps for the student section if the student also filed a **2018 Federal Tax Return**.
* Navigate to the *Sign & Submit* section and submit your correction.

**Option 2: Requesting an IRS Tax Return Transcript- Use this option if you are unable to use the IRS Data Retrieval Tool. *(Personal copies of your 1040 tax returns can no longer be accepted.)***

* Log onto [www.irs.gov](http://www.irs.gov) to use the “Get Transcript” online service.
* By Mail Request IRS Tax Return Transcript. **Do NOT order the “IRS Tax Account Transcript”.**
* Use the social security number and date of birth of the first person listed on your personal income tax return and the address on file with the IRS. The transcript will be mailed to the address on the tax return.
* Indicate the student’s name and date of birth (or Averett ID number, if known) on the transcript before sending to the Student Financial Services Office.

**Option 3: Special Situations**

If you find yourself in one of the rare situations below, you will need to submit different or additional documentation to our office in order to verify your income data.

* **Non- Tax Filer (Student, Parent, or Spouse)-** A non-tax filing verification letter must be submitted via IRS website.
  + Log onto [www.irs.gov](http://www.irs.gov) and click on the “Tools” section of the homepage to click on “*Get Transcript for Tax Records”****.***  After this, you will need to click on *“Get Transcript Online”.*
  + If you do not have an account setup already, you will need to click on “*Create an Account”****.***
  + You will need to enter the social security number, date of birth, tax filing status, street address and zip code or postal of the tax filer. Use the current address on file with the IRS.
  + Select checkbox and click on “Continue” button to proceed as guest or you can choose to fully create the account.
  + Answer 4 multiple choice security questions derived from your credit file and select the reason for getting a transcript- *“Higher Education/ Student Aid”.*
  + Click on the tax year needed under “Verification of Non-Filing Letter” **2018**
* **Dependent Students: Parents are married, but filed separate tax returns.**

Each parent (or step-parent) will need to request his/her own Tax Return Transcript from the IRS. Both need to be submitted to our office.

* **Independent Student:** You and your spouse are married, but filed separate federal tax returns. The student and the student’s spouse will need to request his/her own Tax Return Transcript from the IRS. Both need to be submitted to our office.
* **An amended federal tax return (form 1040X) was filed.**

You must submit two documents:

* A ***signed*** copy of the originally-filed 2018 federal tax return OR a copy of the 2018 IRS Tax Return Transcript, AND
* A ***signed*** copy of the IRS Form 1040X that was filed with the IRS
* **A tax filing extension was granted.**
  + You must submit all of the following items that apply to you:
    - A copy of **IRS Form 4868** “*Application for Automatic Extension of Time to File U.S. Individual Income Tax Return”*, which gives taxpayers *October 15* to file a return.
    - If October 15th has passed, a copy of IRS approval of your request for further extension beyond the automatic six-month extension.
    - A copy of all 2018 W-2 forms.
    - If self-employed, a signed statement with the amount of your 2018 Adjusted Gross Income (AGI) and U.S. income taxes paid.
* **Victims of Identity Theft**

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

* Contact the IRS at 1-800-908-4490
* A Tax Return Database View (TRDBV) transcript obtained from the IRS, or any other IRS tax script(s) that includes all of the income and tax information required to be verified.
* A statement signed and dated by the tax filer indicating that he/she was a victim of IRS tax-related identify theft and that the IRS is aware of the tax-related identity theft.
* **A non-U.S. tax return was filed.**

You must submit a *signed* copy of your non-U.S. tax return. If your tax return is not in English, you will also need to provide an English translation of the information on the document.