

Verification of 2015 Income Information

The IRS Data Retrieval Tool is currently unavailable. Please see the IRS Tax Return Transcript instructions below.

If a student and/or parent is unable to use the IRS data retrieval process, an IRS Tax Return Transcript is required.

A 2015 IRS Tax Return Transcript may be obtained through:

- Online Request - Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get a Tax Transcript by Mail." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

In most cases the 2015 IRS Tax Return Transcript is available within 2–3 weeks after electronically filing a tax return or 6-8 weeks after filing by paper. Contact the Financial Aid Office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the parents filed separate 2015 IRS income tax returns, the **2015 IRS Tax Return Transcript(s)** must be provided for each.

If a student and/or parent is unable to obtain an IRS Tax Return Transcript, they may provide a signed copy of the 2015 tax return (*more information below*).

In March 2017, the Department of Education provided updated guidance that allows colleges and universities to temporarily accept a **signed copy** of parent or student tax returns (1040, 1040A, or 1040EZ) if the parent/student was **unable to obtain a Tax Return Transcript** (instructions above).

The tax return must be signed by one of the individuals listed as the tax filer, even if the taxes are already signed by a "preparer."

This is allowable for the 2017-2018 academic year only.

Verification of 2015 Income Information for Individuals with Unusual Circumstances

Individuals Granted a 2015 Filing **Extension** by the IRS Who Have Not Filed Their Taxes Must Provide:

- 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 copy of IRS Form W–2 for each source of employment income received for tax year 2015
- Adjusted Gross Income Worksheet (this will be added to the student's account once we receive the IRS Form 4868)

Individuals Who Filed an Amended IRS Income Tax Return Must Provide:

- **A 2015 IRS Tax Return Transcript**
- 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 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 Have 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 cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2015 income tax return(s).

Individuals Who Are Nontax Filers Must Provide:

- A statement that says they did not earn money or they earned money but were not required to file. This step is done by indicating the appropriate information under the "How Income Information Will Be Provided" section of the verification form.
- A signed statement listing the sources and amounts of 2015 income earned from work.
- W2's for each source of income earned from work.
- If you were self-employed and did not have a W2 you must submit a signed and dated statement detailing your income for 2015.
- An individual who worked outside of the U.S. and is not required to file taxes with their foreign central government must submit an earning statement from their employer and a statement certifying that they are not required to file taxes within their country. If the individual is self-employed, please provide a statement with income information.
 - If living in another country and unable to provide a Verification of Nonfiling Letter, the individual also must provide proof of that taxing authority's filing requirements, whether obtained directly from the taxing authority or from the taxing authority's website – Can include a letter or email from taxing authority or screen capture from taxing authority's website