Verification Process Options

Option 1: The IRS Data Retrieval Tool - Try this option first. It's faster and easier.
How to use the Data Retrieval Tool -
1. Log in to your 2019-20 FAFSA.
2. Click on *Make FAFSA corrections*. Enter your FSA ID (login and password). Navigate to the *Financial Information* section.
3. **Dependent Student:** When asked if the student's parent(s) have completed a 2017 tax return, update the response to "*Already completed*."
Independent Student: When asked if the student has completed a 2017 tax return, update the response to "*Already completed*."
4. The next questions determine your eligibility to use the IRS Data Retrieval Tool. If you can answer "No" to all of them, you'll be able to enter your PIN and link to the IRS website.
5. Enter your data exactly as it appeared on your federal tax return. If the IRS is able to successfully verify your identity, your 2017 tax information will display.
6. Click *Transfer Now* and then return to the FAFSA website.
7. Repeat these steps in the student section of your FAFSA if the student also filed a 2017 federal tax return.
8. Navigate to the *Sign & Submit* section and submit your corrections.

Option 2: Requesting an IRS Tax Return Transcript
If you are unable to link the FAFSA to the IRS, you must obtain an IRS Tax Return Transcript. "Get Transcript" is an IRS online service that will mail an official IRS Transcripts to the address provided on your tax return. **Personal copies of the (form 1040) tax return forms can no longer be accepted.**
- 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
- Indicate the student's name and date of birth (or Averett ID number, if known) on the transcript before sending to our 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-Filing Tax Letter must be submitted via IRS website at www.IRS.gov.
  1. In the **Tools** section on the homepage, click "Get Transcript for My Tax Records."
  2. Click "Get Transcript Online".
  3. Under "Sign Up", select "Create an Account". If you already have an account, enter your user ID under "Sign In".
  4. Enter the tax filer's social security number, date of birth, tax filing status, street address, and zip or postal code. Use the address currently on file with the IRS. Generally, this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
  5. Select checkbox and click the "Continue" button to proceed as guest. Proceeding as a guest user will require you to enter this information every time you access the system. If you would like this information stored for future use do not check the box. Click the "Continue" button to create a User ID and password.
  6. Answer 4 multiple choice security questions derived from your credit file.
  7. Select the reason for getting a transcript – "Higher Education/Student Aid".
  8. Click on the tax year needed under "**Verification of Non-Filing Letter**". You will need:
     a. **2017** to complete the *2019-2020 Free Application for Federal Student Aid*
- **Dependent Student: Parents are married, but filed separate federal 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:
1. A ***signed*** copy of the originally-filed 2017 federal tax return OR a copy of the 2017 IRS Tax Return Transcript, **AND**
2. 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 until October 15 to file a return.*
- *O*r, 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 2017 W-2 forms.
- If self-employed, a signed statement with the amount of your 2017 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 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/she was a victim of IRS tax-related identity 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.