**IMPORTANT:** The priority deadline for submitting worksheets and all other requested documents and forms is **May 1, 2014.**

### A. Verifying Tax Information

Per federal regulations for acceptable Verification documentation, we can no longer accept copies of the original tax returns. Instead, student(s) and/or parent(s) should provide tax information using one of the two methods listed below.

<table>
<thead>
<tr>
<th><strong>1) IRS Data Retrieval Tool (DRT) on FAFSA</strong></th>
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</thead>
<tbody>
<tr>
<td><strong>What is the DRT?</strong></td>
</tr>
</tbody>
</table>
| **Who can use the DRT?** | Any tax filer is eligible to use the DRT to import their information, with a few exceptions:  
- Taxpayers that filed "married, filing separately"  
- Taxpayers that are married and both filed as "Head of Household"  
- Taxpayers that filed an Amended Tax Return  
- Taxpayers that filed a Puerto Rican or foreign tax return  
*If any of the above categories apply, it is likely you will not be able to import your IRS records using the DRT and will need to request a Tax Return Transcript directly from the IRS. See instructions for this process below.* |
| **When can I use the DRT?** | - **If you filed your tax return electronically,** it is generally 2 to 3 weeks before the IRS has processed the information and it is available to the DRT.  
- **If you filed your tax return by mail,** it is generally 6 to 8 weeks before the IRS has processed the information and it is available to the DRT.  
  **Please note:** These are average processing times; actual IRS processing times do vary greatly depending on the time of year. |
| **How do I use the DRT?** | 1. Log in to the FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov)  
   - select the applicable FAFSA aid year and click "Make a Correction"  
   - enter the PIN and password that was set up when the original FAFSA was filed.  
2. Click on the "Financial Information" tab at the top of the application  
   - on this screen, make sure the tax filing completion status is marked as "Already Completed"  
   - a list of questions will appear and if you answer yes to any of them, you are not eligible to use the DRT  
   - a prompt will appear to enter your FAFSA PIN and then click "Link to the IRS."  
3. Once on the IRS website, enter the requested information  
   - be sure to enter all the information **exactly** as it appears on the original tax return.  
4. If you are successful, your 2013 tax information will appear and you can select "Transfer Now."  
5. You will be transferred back to the FAFSA website, where your IRS information should now be imported  
   - do not manually alter any of the imported tax information or it will make the DRT info invalid and you will not be able to update the tax information again.  
6. Click on the "Sign & Submit" tab at the top of the application to submit your changes.  
*All students who filed a tax return will need to complete steps 2-5 to import the student tax data. Parents of Dependent students will need to repeat steps 2-5 to import parental tax data prior to submitting the changes.* |

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*Hint: There are also many helpful step-by-step videos on [www.youtube.com](http://www.youtube.com), Simply visit the website and search for “IRS Data Retrieval Tool” at the top of the webpage.

*If you cannot use the DRT or receive an error message, you will need to request a Tax Return Transcript from the IRS.*
### 2) IRS Tax Return Transcript

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the Tax Return Transcript?</td>
<td>The IRS Tax Return Transcript shows a line-by-line account of the tax information submitted to the IRS. This process may take longer as the filer must wait for the IRS to send the documents and then forward them to the Office of Financial Aid. However, it may be the most convenient option for filers that are not close to a regional IRS office or cannot use the IRS Data Retrieval Tool.</td>
</tr>
<tr>
<td>Who can use the Tax Return Transcript?</td>
<td>As long as the tax return has not been recently filed, any tax filer can request a Tax Return Transcript from the IRS.</td>
</tr>
</tbody>
</table>
| When can I get a Tax Return Transcript? | - *If you filed your tax return electronically*, it is generally 2 to 3 weeks before the IRS has processed the information and a transcript becomes available.  
- *If you filed your tax return by mail*, it is generally 6 to 8 weeks before the IRS has processed the information and a transcript becomes available.  
*Please note: These are average processing times; actual IRS processing times do vary greatly depending on the time of year.* |
| How do I request a Tax Return Transcript? | **OPTION #1: (Fast)**  
   a. Choose “Get Transcript Online.”  
   b. Create a user account following the steps provided.  
   c. Follow the instructions provided to print a copy of your Tax Transcript online.  
2. **OPTION #2:**  
   - Choose “Get Transcript by Mail”  
   - Enter the requested information exactly as it appears on the original tax return.  
   2. If successful, the IRS will send the requested documentation to the Tax filer’s address (as listed on their original tax return) within 6-10 business days.*  
3. **OPTION #3:**  
   1. Call the IRS’ automated tax line at 1-800-908-9946  
   - Follow the automated menu to order a “IRS Tax Return Transcript”  
   - Enter the requested information, using your phone’s touch pad, exactly as it appears on the original tax return.  
   2. If successful, the IRS will send the requested documentation to the tax filer’s address (as listed on their original tax return) within 6-10 business days.*  
4. **OPTION #4:**  
   1. Visit a regional IRS office to request a Tax Return Transcript in person.  
   2. Bring 2 forms of government-issued ID to confirm your identity.  
*Processing time may vary drastically depending on the volume of document requests.*  

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**Please make sure you request a Tax Return Transcript. We cannot accept copies of original 1040 tax returns, Tax Account Transcripts or Tax Summaries.**  
**If you receive an error message when requesting this document, please contact the Office of Financial Aid for further instructions.**

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### 3) Requesting W-2 forms  (IRS terminology = Wage and Income Transcripts)

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the Wage and Income Transcript?</td>
<td>Wage and Income Transcripts show data from information returns, such as W-2s, 1099s, and 1098s, reported to the IRS.</td>
</tr>
<tr>
<td>Who can use the Wage and Income Transcript?</td>
<td>Any tax filer missing a W-2 form can request a Wage and Income Transcripts from the IRS.</td>
</tr>
<tr>
<td>When can I get a Wage and Income Transcript?</td>
<td>The Wage and Income Transcripts can be requested from the IRS by the same methods described above to request the Tax Return Transcript.</td>
</tr>
</tbody>
</table>
B) 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:

1. 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;

2. 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;

3. A copy of IRS Form W–2 for each source of employment income received for tax year 2013 and/or, 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.

C) 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:

1. A signed copy of the original 2013 IRS income tax return that was filed with the IRS or a 2013 IRS Tax Return Transcript.

2. And a signed copy of the 2013 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

D) 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.

E) Individuals Who Filed Non-IRS Income Tax Returns

If 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, they must provide a signed copy of that 2013 income tax return(s).