



IRS Tax Return Transcript Request Process

Your 2017-2018 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called **verification**. To verify that you provided correct information, the AU Financial Aid Office will compare your FAFSA with your 2015 IRS tax information and with any other required documents.



The IRS Data Retrieval Tool (DRT) on the FAFSA website at www.fafsa.ed.gov has been temporarily disabled. To verify your tax information, please follow the instructions below to obtain an IRS Tax Return Transcript from the IRS. If the taxpayer and spouse filed separate income tax returns, the 2015 IRS Tax Return Transcript(s) must be provided for each.

In most cases, for electronic filers, the 2015 IRS income tax return information is available to obtain an IRS Tax Return Transcript within 2-3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available to obtain an IRS Tax Return Transcript within 6-8 weeks after the 2015 paper IRS income tax return has been received by the IRS.

Instructions for Requesting an IRS Tax Return Transcript

Individuals who are unable to use or choose not to use the IRS DRT tool on the FAFSA website may obtain an IRS tax return transcript online at www.irs.gov by clicking under the Tools heading on the link "Get a Tax Transcript" or by calling 1-800-908-9946. Make sure to request the **"IRS Tax Return Transcript"** and not the "IRS Tax Account Transcript". Use the Social Security Number and date of birth of the first person listed on the 2015 IRS income tax return and the address on file with the IRS (normally this will be the address used on the IRS income tax return).

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, neither the DRT nor the tax transcript will be available. Please provide the following documents to the Financial Aid Office to verify your income:

- A copy of the IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Tax Return" that was filed for the IRS tax year 2015; **AND**
- A copy of the IRS's approval of extension beyond the automatic six-month extension, **AND**
- Verification of Non-filing Letter from the IRS dated on or after October 1, 2016, **AND**
- A copy of the IRS Form W-2 for each source of employment income received for tax year 2015, **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 2015.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2015, neither the tax transcript nor the DRT will have the updated information. Please provide the following documents to the Financial Aid Office to verify your income:

- A 2015 IRS Tax Transcript, or any other IRS tax transcript(s) that includes all of the income and tax information to be verified, **AND**
- 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 Identity Theft

A victim of IRS identity theft who has been unable to obtain a 2015 IRS Tax Return Transcript or use the IRS DRT should submit the following documents to the Financial Aid Office to verify income:

- A Tax Return Database View (TRDBV) transcript obtained from the IRS. This is available by calling the IRS's Identity Protection Specialized Unit (IPSU) toll free number at 800-908-4490; **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 Filed Non-IRS Income Tax Returns with U.S. Territories

If an individual filed taxes outside of the U.S., one of the following needs to be submitted.

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.

Individuals Who Filed Non-IRS (Foreign) Income Tax Returns

A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, must provide one of the following. ***If the document is not in English, you must also provide a translated copy.***

- Tax Account information from the relevant tax authority, **OR**
- If you are unable to obtain the tax account information free of charge, you must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of your income tax return that was filed with the relevant tax authority.

Individuals Who Did Not File Taxes in 2015

Nontax filers and tax filers who received an extension but still have not filed their income tax return must provide ***confirmation of nonfiling*** from the IRS dated on or after October 1, 2016. A confirmation of nonfiling can be obtained from the IRS using Form 4506-T and checking box 7. If your taxes would have normally been filed in another country, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.