

IRS Tax Return/Tax Transcript

Your 2019-2020 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 2017 IRS tax information and with any other required documents.



Before submitting a tax return or requesting a tax transcript, you should first log in to the FAFSA website at www.fafsa.ed.gov to use the IRS Data Retrieval Tool (DRT). If you are able to successfully use the DRT to self-verify your tax data, then you do NOT need to submit a copy of your taxes. Once you use the DRT, the AU Financial Aid Office will receive an updated FAFSA indicating that this has been completed. If the tax-payer and/or spouse filed separate income tax returns, the IRS DRT cannot be used.

In most cases, for electronic filers, the 2017 IRS income tax return information is available for the IRS DRT within 2-3 weeks after the 2017 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2017 paper IRS income tax returns, the 2017 IRS income tax return information is available for the IRS DRT within 6-8 weeks after the 2017 paper IRS income tax return has been received by the IRS.

If you are unable or unwilling to use the DRT, you must submit one of the following to verify the tax data you entered into your FAFSA. See instructions below if you filed an amended tax return, foreign tax return, or if you did not file taxes in 2017.

- Signed 2017 IRS Tax Return, OR
- 2017 IRS Tax Transcript

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2017 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 2017; **AND**
- A copy of the IRS's approval of extension beyond the automatic six-month extension, **AND**
- Verification of Nonfiling Letter from the IRS dated on or after October 1, 2017, (confirmation that the tax return has not yet been filed – see below if you are unable to obtain this from the IRS) **AND**
- A copy of the IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2017, **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 2017.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2017, 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 signed 2017 paper IRS tax return or 2017 IRS Tax Transcript, **AND**
- A signed copy of the 2017 IRS Form 1040X, “Amended U.S. Individual Income Tax Return” that was filed with the IRS.

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

A tax filer who filed an income tax return with a tax authorities other than the IRS, 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.***

- Signed copy of your income tax return that was filed with the relevant tax authority.
- If you also filed a U.S. tax return, you must provide a signed copy of the 2017 U.S. tax return.

Instructions for Requesting an IRS Tax Return Transcript

If you do not have a copy of your signed paper tax return for 2017, you can request a tax transcript from the IRS. *Do NOT have the IRS mail this straight to AU as there is often nothing on the transcript to identify the student. You will need to have this sent to your address and then forward the document on to our office with the student’s AU ID# included on the top of the 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 2017 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). You can also submit a paper request using IRS Form 4506-T or IRS Form 4506T-EZ. The transcript is generally received within 10 days from the IRS’s receipt of the online or paper request.

Individuals Who Did Not File Taxes in 2017

If you did not file taxes AND you are one of the following individuals listed on the FAFSA, you must provide an IRS Verification of Nonfiling Letter (confirmation that the tax return has not yet been filed):

- Parent listed on the FAFSA for a Dependent Student
- Independent Student listed on the FAFSA
- Spouse of an Independent Student listed on the FAFSA

The IRS Verification of Nonfiling Letter must be dated on or after October 1, 2017. 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.

If you are unable to obtain an IRS Verification of Nonfiling, you may submit a signed statement that includes:

- A statement certifying that you attempted to obtain the Verification of Nonfiling from the IRS (or foreign tax authority) and was unable to obtain the document, **AND**
- A statement that you have not filed and are not required to file a 2017 income tax return, **AND**
- A list of all sources of 2017 income earned from work and the amount of income from each source

How to Securely Submit Verification Documents to the Financial Aid Office

Option 1 (Preferred)

Current students can submit documents electronically by following these steps:

1. Open a browser to the webpage go.american.edu/verification
2. Enter your (student's) full AU email address* Ex: student@american.edu
3. Enter your (student's) AU portal password.
4. Complete the form
 - a. Select the specific documents you are submitting
 - b. To attach the form, click on the attachment icon in the lower right of the form
 - c. Select the documents from your computer/device. They should then appear at the bottom of the form.
5. Hit submit

Prospective students applying for admission can submit documents using Option #2 or Option #3 below.

Option #2

The student or parent(s) can submit documents via secure fax to 202-885-1025. Be sure to include the students name and AU ID# on all documents.

Option 3

The student or parent(s) can submit documents via the post office to AU Financial Aid Office, 4400 Massachusetts Ave, NW, Washington DC 20016-8001. Be sure to include the students name and AU ID# on all documents.

To protect your information, NEVER submit documents via email.

Questions?

To speak with a financial aid counselor, call our office at 202-885-6500 or email facounselor@american.edu.