

IRS Tax Return Transcript Request Process

Your 2014-2015 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 2013 IRS tax information and with any other required documents.



Before requesting a 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 tax return transcript. Once you use the DRT, the AU Financial Aid Office will receive an updated FAFSA indicating that this has been completed.

In most cases, for electronic filers, the 2013 IRS income tax return information is available for the IRS DRT or to obtain an IRS Tax Return Transcript within 2-3 weeks after the 2013 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2013 paper IRS income tax returns, the 2013 IRS income tax return information is available for the IRS DRT or to obtain an IRS Tax Return Transcript within 8-11 weeks after the 2013 paper IRS income tax return has been received by the IRS.

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, 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 2013; AND
- A copy of the IRS Form W-2 for each source of employment income received for tax year 2013, AND
- If self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2013.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2013, 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 copy of the original 2013 IRS income tax return that was filed with the IRS or a 2013 IRS Tax Return Transcript (signature not required) for the 2013 tax year, AND
- A signed copy of the 2013 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 2013 IRS Tax Return Transcript or use the IRS DRT must provide the following:

- A signed copy of the original 2013 IRS income tax return that was filed with the IRS, AND
- A signed copy of the IRS Form 14039 "Identity Theft Affidavit" if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him to submit one, he may provide one of the following:
 - A statement signed and dated by the individual indicating that he/she was a victim of IRS identity theft and that the IRS is investigating the matter. The statement must also indicate that the individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he/she was not required to file the form, or
 - A copy of a police report if it was filed related to the IRS identity theft.

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 on the "Order a Return or Account 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 2013 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). If a student and spouse or a parent and spouse filed their tax returns separately, a 2013 IRS Tax Return Transcript must be provided for BOTH.