Verification of 2013 Income Information for Student Tax Filers

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2013 or had a change in marital status after the end of the 2013 tax year on December 31, 2013.

Instructions: Complete this section if the student and spouse filed or will file a 2013 IRS income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2013 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic tax return filers, 2013 IRS income tax return information for the IRS DRT is available 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 within 8–11 weeks after the 2013 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

Check the box that applies:

☐ The student has used the IRS DRT in FAFSA on the Web to transfer 2013 IRS income tax return information into the student’s FAFSA.

☐ The student has not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2013 IRS income tax return information into the student’s FAFSA once the 2013 IRS income tax return has been filed.

☐ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a 2013 IRS Tax Return Transcript—not a photocopy of the income tax return plus a copy of all W-2’s. IRS Tax Return Transcripts are obtained by either 1) retrieving online, 2) ordering online, or 3) calling 1-800-908-9946 to order. If retrieving or ordering online go to www.IRS.gov. Under the Tools column, click “Get Transcript of your Tax Records”. Select either Get Transcript Online or Get Transcript by Mail. If you select online, follow the instructions to create an account to retrieve your 2013 Tax Return Transcript. If you order it to be sent by mail, make sure you order the 2013 Tax Return Transcript. You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

If the student and spouse filed separate 2013 IRS income tax returns, 2013 IRS Tax Return Transcripts must be provided for both.

☐ Check here if a 2013 IRS Tax Return Transcript(s) is provided.

☐ Check here if a 2013 IRS Tax Return Transcript(s) will be provided later.