

2022-2023 IRS Tax Filer Verification Instructions



Office of Scholarships and Financial Assistance

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Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. We are required to verify your 2020 Federal tax information (and spouse, if married) and/or your parent(s) 2020 Federal tax information (if dependent). Please review options for providing this information to our office and utilize the option most comfortable to you and/or your parents.

Option 1 - IRS Data Retrieval Tool (DRT) - preferred and quickest option

- Log into your FAFSA at fafsa.ed.gov
- Select 'Make FAFSA Corrections'
- Navigate to the student and/or parent 'Financial Information' tab
- If you qualify to use the IRS DRT, enter your FSA ID and select 'Link To IRS'. Select 'Proceed to the IRS Site'
- Once on the IRS website, enter all of your information correctly. Select 'Submit'
- Select 'Transfer My Tax Information into the FAFSA' and select 'Transfer Now'
- Make sure to sign and submit your FAFSA at the end of the application

Option 2 - Submit a copy of your IRS Tax Return Transcript

There are four ways to request a Tax Return Transcript directly from the IRS. Use one of the options to request the transcript. Once you receive the transcript from the IRS, send a copy to our office.

- Visit the IRS website at irs.gov/Individuals/Get-Transcript and select 'Get Transcript **ONLINE**'. Create an account and verify it with the IRS. Select Higher Education/ Student Aid for the reason needing a transcript. Select the Return Transcript for 2020 and print the document provided. Submit this to our office with your student's 919# to ensure our office can match the transcript received to the correct student record.
- Visit the IRS website at irs.gov/Individuals/Get-Transcript and select 'Get Transcript by **MAIL**'. You will enter your identifying information and the IRS will mail your Tax Return Transcript in 5 to 10 business days to the address on your tax form. For 'Type of Transcript', select '**Tax Return Transcript**'. Do not select 'Tax Account Transcript'. For 'Tax Year', select '2020'.
- Call the IRS automated number (800)-908-9946. Provide your identifying information and the IRS will mail your Tax Return Transcript in 5 to 10 business days to the address on your tax form.
- Print and complete IRS Form 4506T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> and mail or fax the form directly to the IRS. Requests using this option are usually processed in 7 to 10 business days. This would be the option to use if your mailing address has changed from the address on your federal income tax form.
 - In Box 5 of this form, please include your student's 919# to ensure our office can match the transcript received to the correct student record

Option 3 – Submit a signed copy of your 1040 IRS Tax Return

- Provide a copy of your 1040 tax return that was submitted to the IRS.
 - **This document must be signed by the taxpayer or include paid tax preparer ID on page 1.**
- Be sure to include Schedules 1, 2, and 3 if these schedules are applicable to your tax return.

If you are having trouble obtaining a copy of your tax return transcript, you can contact your local IRS Taxpayer Advocate. For the phone number, visit <https://www.irs.gov/advocate/local-taxpayer-advocate> and select the state you filed in to locate the appropriate phone number.