

2016-2017 VERIFICATION – IRS TAX RETURN TRANSCRIPTS

DEPENDENT STUDENT

Dear Student –

Your 2016-2017 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called Verification. This means that we must compare the information you included on your FAFSA with your IRS Tax information. **Since your current FAFSA application indicates that IRS data was not transferred to your FAFSA application via the Data Retrieval process, we will need copies of your 2015 IRS Tax Return Transcript (or W2 Forms if a 2015 Tax Return was not filed).** Below is the information we will need to complete your file.

STUDENT INFORMATION – Please print clearly

Last Name *First Name* *Social Security Number or Student ID Number*

Tax Forms and Income Information

Do not leave this section blank!

	TAX FILER: Filed a 2015 Federal Tax Return <i>(use Option 1 or 2 on back)</i>	NON-TAX FILER: Earned income in 2015 but did not file/was not required to file a 2015 tax return <i>(use Option 3 on back)</i>	NON-TAX FILER: Did not earn income in 2015 and did not file a 2015 tax return <i>(no tax documents required)</i>
You (student)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent #1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent #2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CERTIFICATION: By signing this worksheet, I certify all the information reported is complete and correct:

Student Signature *Date* *Student ID Number*

Parent Signature *Date* *Parent Name (Please Print)*

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

How to Provide Tax Information to Ursuline:

Option #1: Electronically transfer data using the IRS Data Retrieval Tool in the FAFSA

1. Sign in at www.fafsa.ed.gov
2. Select **Make a Correction**
3. Choose the **Financial Information** tab to access parent and student financial information sections. *(you will need to complete the IRS Data Retrieval under Student Financial Information and if Dependent, Parent Financial Information.)*
4. The first question regarding tax filing status must be changed to **Already Completed**.
5. Review the boxes to see if any of the following circumstances apply; if not, select **None of the Above**.
 - You **cannot** use the IRS Data Retrieval Tool if any of the following apply:
 - Parents/student is married, but filed separate tax returns
 - Filed an amended tax return
 - Filed a Puerto Rican or foreign tax return
6. You will be presented with the option to link to the IRS.
 - If prompted, enter your FSA Username and Password. *(If you logged in to the FAFSA using your FSA Username and Password you will not be prompted to do it again.)*
 - Click **Link to IRS**
 - You will now be taken out of the FAFSA and into the **IRS website**
 - Fill in your address information (this must match exactly the address as it was used to file your 2015 tax return)
 - Select **Transfer My Tax Information into the FAFSA**
 - Next, click **Transfer Now** to complete the transfer of information.
7. Once back in the FAFSA, go to the bottom of the screen and click **Save**, then click **Next**
8. **IMPORTANT:** Once all information is transferred into the FAFSA, **SAVE AND SUBMIT** YOUR FAFSA. Make sure you receive a confirmation page of submission.

Option #2: Order a Tax Return Transcript from the IRS

1. Go to www.irs.gov
2. Under the section labeled **Tools**, click on **"Get a Tax Transcript"**
3. Be sure to order the **IRS Tax Return Transcript**, **not** the IRS Tax Account Transcript
4. **You will need:**
 - Social Security Number
 - Date of Birth
 - Address on file with IRS (normally this is the address you used when you filed your 2015 taxes)
5. Please note that IRS tax information can be accessed from their system about two to three weeks **after** you have file your electronic return, or eight to eleven weeks after a paper tax return is filed.

****If parents filed separate tax returns, you will need each parent's individual IRS Tax Return Transcript**

Option #3: Non-Tax Filers who earned income must submit a copy of any/all W-2s to verify income earned.

Office of Financial Aid