

If your FAFSA is selected for verification; ***Federal Tax Return Transcripts, W-2 forms and additional financial information*** may be needed to complete your financial aid file. Your financial aid will be estimated and cannot be finalized nor can it credit to your student account until the requested items have been received and reviewed.

Below are some helpful hints to insure submitted items are correct and complete.

**When will your tax transcripts be available?**

- A. If you were not required to send a payment to the IRS, your transcript information should be available two weeks after filing electronically or eight weeks after filing by mail.
- B. If you had to send the IRS a payment, your transcript should be available after May 1st if you filed electronically and after June 1st if you filed by mail.
- C. If you filed for an extension, your transcript should be available two weeks after your final return is filed.

**Please also note:**

- If you filed an amended return, you will need to send us a signed copy of your original tax transcript and a copy of the 1040X form.
- If you're married but you and your spouse filed separate returns, you are not eligible for the import and must request copies of both tax transcripts.
- Foreign tax filers: Please provide a signed copy of your foreign tax return (and the currency exchange rate if not in U.S. dollars).
- Same-sex couples must report their marital status as married if they were legally married in a state or other jurisdiction that permits same-sex marriage, without regard to where the couple resides.

**What if I didn't file a tax return?**

If you are a parent (s) or independent student who did not file and were not required to file a federal tax return, you must request a **Verification of Non-Filing Letter (VONF)** from the IRS by going to **irs.gov** and electronically request through the **Get Your Tax Record** link. Send a copy to the Office of Financial Aid by mail, fax or email.

**Do you need to file a tax return?**

Please refer to [www.irs.gov](http://www.irs.gov) for more specific filing requirements, but typically you must file if:

- A. You are married and your combined gross income is more than \$24,800 (if filing separate: must file with income over \$5).
- B. You are single (with a dependent-filing as head of household) and gross income is more than \$18,650.
- C. You are single (and parents claim you on their tax return) and earned income is more than \$12,400.
- D. You are single (and parents cannot claim you on their tax return) and gross income is more than \$12,400.

**Which parent's W-2 and tax information do we need?**

- A. If parents are married to each other, we need tax information for both parents.
- B. If parents are divorced and **custodial parent\*** is **not** remarried, we need tax information for your custodial parent only.
- C. If parents are divorced and **custodial parent\*** is **remarried**, we need tax information for your parent and step-parent.
- D. If parent is single (or widowed and not remarried), we need tax information for that parent only.
- E. If parents are not married, but live together, we need tax information for both parents.

**\*For divorced parents, the custodial parent is the parent who you have lived with most during the 12 months prior to filing the FAFSA. If you lived equally with both parents, then the parent who provided more financial support is the custodial parent.**

## Using the FAFSA IRS Data Retrieval Tool to Import your Tax Transcript

1. Sign in using your FSA ID at <https://studentaid.gov>
2. Select **Make A Correction**. (Select Continue if you started a FAFSA, but haven't submitted it yet.)
3. Choose **Financial Information Tab**
4. First question on page needs to be answered: **Already Completed**.
5. Then review the check boxes to see if any of these circumstances apply, if not, select **None of the Above**.  
You **cannot** use the retrieval tool if any of the following apply (please see options below to request your tax return transcript):
  - a. Married, filing separately
  - b. Married, but one or both filed as Head of Household
  - c. Filed an amended tax return
  - d. Filed a Puerto Rican or foreign tax return
6. You will be presented with the option to Link to the IRS:
  - a. Click **link to IRS** and continue to select OK as you are being directed to IRS website.
  - b. Fill in filing status
  - c. Fill in address information
  - d. Click **Submit**
  - e. Check the box for "Transfer My Tax Information into the FAFSA" and then Select **Transfer Now**.
7. Once back into FAFSA, go to bottom of screen and click **Save**, then click on **Next**.
8. To complete the **Student's IRS Data retrieval**, repeat steps 4-7.
9. **IMPORTANT STEP:** Once back into FAFSA, Save and Submit your FAFSA by signing with your FSA ID, agreeing to their terms, and then click **Submit**.

## To request a Tax Return Transcript or Wage and Income Transcript from the IRS (choose one):

1. Go to the IRS website at [IRS.gov](https://www.irs.gov) click on "Get Your Tax Record." On the next page you can choose to "Get Transcript Online." or "Get Transcript by Mail". Choose your preference and follow the instructions.
2. Download the IRS2GO App to your mobile device.
3. Call the IRS at 1-800-908-9946.
4. Complete the IRS form 4506-T online . Print, fax or email a copy to the IRS.

## W-2 Forms

If employed the prior year and a tax return was filed, W-2 forms are needed for everyone listed on the FAFSA.

If student **did not file**, but still had wages and are a Dependent you should complete the **Student Non-Filer form** located on our website at [www.valpo.edu/sfs](http://www.valpo.edu/sfs) (click forms, then verification forms)

If you are a parent or independent student then you are required to submit a **Wage and Income Tax Transcript** available at <https://www.irs.gov>.

## Instructions to obtain Verification of Non-filing :

1. Go to <https://www.irs.gov>, click on "Get Your Tax Record"
2. Click on "Get Transcript Online"
3. Sign in and/or create an account
4. Request Verification of Non-filer Letter
5. Also request a Wage and Income Transcript (Form W-2, Form 1099), regardless of whether or not you worked.

## Additional Financial Information

In addition to the Tax Transcripts and the W-2 forms, you may be asked to submit supplementary documents available on our website at [www.valpo.edu/sfs](http://www.valpo.edu/sfs) (click forms, then verification forms). If requested, these downloadable forms provide information necessary to complete the verification process. The most commonly requested forms include: **Dependent or Independent Tax & Additional Resource Worksheets, Household Worksheet, FAFSA signature page or Asset worksheet**. Please be sure to check the "My documents" section of Financial Aid to view all needed documents.