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Fox Valley Technical College is required, in certain circumstances, to verify information that was provided by a student on the FAFSA (Free Application for Federal Student Aid). **Due to Federal regulations, FVTC will no longer accept copies of any Federal 1040 tax return.** We are verifying **2016 tax information** for the 2018-19 academic year.

Option 1: IRS Data Retrieval (IRS DRT) (preferred method and fastest turn around!)

The FAFSA provides the opportunity for students and/or parents (if dependent) to utilize the **IRS Data Retrieval option**. This method pulls the tax data directly from the IRS to ensure that all information is entered correctly.

- If you did not use the IRS Data Retrieval (IRS DRT) option when you initially filed your FAFSA, we highly encourage you to **make a correction to your existing FAFSA** and use the IRS Data Retrieval option.
 - Go to <https://fafsa.ed.gov/> and click on **Login**.
 - Select "Make a correction to your existing FAFSA," and go to the **Financial Information tab** to click on "**LINK TO IRS**".
 - The address you submit with this tool must match EXACTLY to the address used on the original IRS tax return.
 - Click on "Transfer information to FAFSA," then "Transfer Now."
 - All information transferred from the IRS are masked with the text "transferred from the IRS."
 - Please be sure all applicable financial questions are answered.

Option 2: Federal Tax Return Transcript (required if IRS Data Retrieval was not used)

Please choose one of the following options to request a Tax Return Transcript:

- **Online Request:** Go to <https://www.irs.gov/individuals/get-transcript>. **You can select ONLINE or by MAIL.**
 - To retrieve your transcript online instantly, you must be able to verify your identity – for example provide financial verification info (such as credit card, auto loan, mortgage) and mobile phone access in your name. If you are unable to verify your identity, choose the by Mail option.
 - If you choose the by Mail option, the address you enter must match the address already on file with the IRS exactly. It is typically the address on your most recent tax return. The transcript is generally received within 10 business days from the IRS's receipt of the online request.
 - If you have moved since you filed your last tax return, you should use the paper request form or phone request (below).
- **Paper Transcript Request Form 4506T:**
 - **DO NOT** request your transcript to be sent directly to FVTC, leave line 5 blank.
 - Check box 6a (Return Transcript), and request tax year ending 12/31/2016.
 - Fax or mail the form to the IRS per the instructions on page 2 of the form.
 - The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.
- **Phone Request:** Call 1-800-908-9946 for the automated system or 1-800-829-1040 to speak with a representative
 - You must speak with an IRS representative if you want the transcript faxed to you.
 - You may need to call to speak with an IRS representative if your mailing address has recently changed.
 - The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

REQUEST TAX YEAR 2016

Special Tax Return Circumstances

Individuals Who Filed an Amended Tax Return in 2016:

An Individual who filed an amended tax return for the tax year 2016 must provide:

- A **2016 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A **signed** copy of the 2016 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim if IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Verification of 2016 Income Information for Individuals with Unusual Circumstances Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2016 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2016, must provide:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2016;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2016;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2017;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2016 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2016.

If you have any issues in obtaining an IRS Tax Transcript (issues with name, address, etc.), please contact the IRS Taxpayer Advocate Office at 877-777-4778 or review **Get-Transcript FAQs**,

<http://www.irs.gov/Individuals/Get-Transcript-FAQs>.

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