

Student Financial Services
1825 N Bluemound Dr
PO Box 2277
Appleton, WI 54912-2277

Email: financialaid@fvtc.edu
Phone: 920-735-5650
Fax: 920-735-5763
Website: www.fvtc.edu/finaid

Fox Valley Technical College is required, in certain circumstances, to verify information that was provided by a student on the FAFSA. Per Federal regulation, we are verifying **2019 tax information** for the 2021-22 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://studentaid.gov/h/apply-for-aid/fafsa> and click on **Login**, then "I am the student."
 - 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-EZ](#)**
 - **You may enter your FVTC Student ID # in Line 5**
 - Line 6 enter "2019"
 - Be sure to check the "Signatory attests" box, sign and date, and enter your phone number.
 - 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 request form.
- **Phone Request:** Call 1-800-908-9946 for the automated system.
 - Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally, this will be numbers of the street address that was listed on the latest tax return filed. You may need to call to speak with an IRS representative if your mailing address has recently changed.
 - Select "**Option 2**" to request an IRS Tax Return Transcript (**not** "Tax Account Transcript") and then enter "**2019**".
 - The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

Option #3: Only acceptable if Options 1 & 2 were unsuccessful

- Provide a SIGNED copy of your 2019 IRS Form 1040, **and**
- A written, signed statement explaining the steps taken to obtain a tax return transcript but were unsuccessful.

REQUEST TAX YEAR 2019

Special Tax Return Circumstances

Individuals Who Filed an Amended Tax Return in 2019:

An Individual who filed an amended tax return for the tax year 2019 must provide:

- A **2019 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 the income and tax information required to be verified; **and**
- A **signed** copy of the 2019 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.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2019 IRS income tax return and has been granted a filing extension by the IRS **beyond the automatic six-month extension** for tax year 2019, 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 2019;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2019;
- 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 15, 2019;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2019 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 2019.

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>.

REQUEST TAX YEAR 2019