Parent Tax Filer Income Verification Information 2019-2020

Important Notes:
- This form is for instructional purposes only and is not required to be returned to the University of Idaho.
- The instructions below explain how to satisfy the requirements of verification of tax filing information. If you have a special circumstance, please see the back of this form for additional guidance. If you still have questions, please contact our office for more assistance.
- If ordering a tax transcript from the IRS (see below), do not have the form sent directly to the University of Idaho. We may not be able to identify to whom the information belongs. Please have it sent directly to yourself and then send it along with your student’s name and student’s V# to our office.
- We cannot accept signed copies of the tax return to fulfill the verification requirement.

Instructions:
The best way to satisfy the requirement for a 2017 tax transcript is by using the IRS Data Retrieval Tool (IRS DRT) as part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2017 income information that was transferred into the student’s FAFSA using the IRS Data Retrieval Tool. Please review options below to either a) transfer the required information directly into the FAFSA using the IRS Data Retrieval Tool or b) follow the instructions to request a copy of the 2017 Tax Return Transcript from the IRS and, upon receipt, provide a copy to Student Financial Aid Services.

Options:

- (PREFERRED METHOD) Parent, if you can do so, use the IRS Data Retrieval Tool through FAFSA on the Web to transfer 2017 IRS income tax return information into the student’s FAFSA.
  1. Have your student log into the 2019-2020 FAFSA.
  2. In the financial information tab on the FAFSA, you’ll be prompted to use the IRS Data Retrieval after answering eligibility questions. Provide the required FSA ID and password (if requested) then click “Link to IRS”. Provide the tax filer name, address, and other information exactly as it appears on the 2017 tax return.
  3. DON’T FORGET - Check the “Transfer my Tax Information into the FAFSA” box. Click “Transfer Now”.
  4. Remember to review any other remaining items in the FAFSA and navigate to the last page where it should be signed and submitted again. UI Student Financial Aid Services will receive the corrected information within 1-2 weeks, depending on processing time.

- Parent, if you are unable to use the IRS DRT in FAFSA on the Web, and instead will provide the University of Idaho a 2017 IRS Tax Return Transcript(s), you may obtain one through one of the following methods:
  - Get Transcript by MAIL – Go to www.irs.gov, click “Get My Tax Record.” Click “Get Transcript by MAIL” and follow the prompts. Make sure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript.”
  - Automated Telephone Request – 1-800-908-9946
  - Paper Request – IRS Form 4506-T (contact Student Financial Aid Services if you need assistance completing this form)

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See the back of this form for more information if you:
- have experienced a marital status change since 2017
- are an extension filer who has not yet filed 2017 taxes
- filed an amended 2017 tax return
- are the victim of tax-related identity theft, or
- filed a non-IRS tax return
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**Individuals who have Experienced a Marital Status Change since 2017 Must Provide to UI:**
- If you filed a joint tax return for 2017, but were no longer married when your student filed the 2019-2020 FAFSA, you will need to submit a copy of your 2017 tax transcript and a copy of your income/wage statements, i.e. 2017 W2(s), Schedule C, etc.
- If you did not file a joint tax return for 2017 but were married or re-married when your student filed the 2019-2020 FAFSA, you will need to provide a copy of both yours and your current spouse’s 2017 tax transcripts. **Reminder** – make sure your new spouse's demographic information is included on your student's FAFSA.
- If you filed a joint tax return for 2017 but were married to a different person when your student filed the 2019-2020 FAFSA, you will need to provide a copy of both yours and your current spouse’s 2017 tax transcripts. Also provide a copy of your income/wage statements, i.e. 2017 W2(s), Schedule C, etc. If your current spouse was married to a different person in 2017 and filed a joint tax return, we will also need a copy of your spouse’s income/wage statements, i.e. 2017 W2(s), Schedule C, etc. **Reminder** – make sure your new spouse’s demographic information is included on your student's FAFSA.
- If you were widowed since 2017, please provide a copy of your 2017 tax transcript and a copy of your income/wage statements, i.e. 2017 W2(s), Schedule C, etc. Please contact Student Financial Aid Services for information and options available to you and your student if you feel the information reported on your 2017 taxes no longer accurately represents your family situation.

**Individuals Granted a Filing Extension by the IRS Must Provide to UI:**
- A signed, dated statement certifying the amount of the 2017 Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2017, and
- 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 2017, and
- A copy of IRS Form W–2 for each source of employment income received for tax year 2017,
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2017, and
- 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, 2018.

**Individuals Who Filed an Amended IRS Income Tax Return Must Provide to UI:**
- A signed copy of the 2017 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 Must Provide to UI:**
- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all 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 Who Filed Non-IRS Income Tax Returns Must Provide to UI:**
- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.