

# IRS Documentation and Data Retrieval Tool Information

## Tax Filers:

Your file has been chosen for verification, and we have to verify the tax information you submitted on the FAFSA. The best way to handle this is listed below:

### IRS Data Retrieval Tool Instructions for Parents or Students

- Go to [www.fafsa.gov](http://www.fafsa.gov)
- Click on Start Here
- Enter FSAID and password as requested
- Select Make Correction to FAFSA
- Click on Financial Information tab for student &/or parent
- Change drop down box from Will File to Already Completed
- Answer next few questions
- Click on blue "Link to IRS" box
- The next screen will inform you that you are leaving FAFSA on the Web. Click OK to continue.
- The IRS.gov screen will appear next. Enter information requested and click on Submit.
- Once the IRS has validated your identification, your **2019** Federal Income Tax information will appear on the screen.
- Click on box under Transfer My Tax Information into the FAFSA. Then click on Transfer Now button.

**\*\*Remember to electronically sign and submit again!**

### Online Instructions:

- Go to [www.irs.gov](http://www.irs.gov)
- Choose "Get Your Tax Record"
- To get via regular postal service, choose "Get Transcript BY mail"
- Follow online instructions to request a copy of your **2019** Tax Return Transcript by mail.
- Transcripts generally within 10 business days.
- To get via download, choose "Get Transcript Online"
- Make sure to request the "Return Transcript" and **NOT** the "Account Transcript"
- Follow the instructions to create an account
- The transcript displays online upon successful completion of the IRS's two-step authentication.

### Telephone Request Instructions:

- Call the IRS at **1-800-908-9946**
- Tax filers must follow prompts to enter information.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter "**2019**".
- Make sure to request the "Return Transcript" and **NOT** the "Account Transcript"
- Once successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript within 10 business days.

*\*\*\*Once received, please mail a copy of the IRS Tax Return Transcript to: South Arkansas Community College, Attn: Financial Aid, P.O. Box 7010, El Dorado, AR 71731.*

## Nontax Filers:

All INDEPENDENT nontax-filers must provide proof of non-filing.

- If a student filed the FAFSA as independent (not using parent information) and didn't file taxes in 2019, they will have to turn in proof of non-filing as detailed below.
- If a student who filed the FAFSA as a dependent (using parent information), and their parent didn't file tax information, the student's parent(s) will have to turn in proof of non-filing as detailed below.

Non-filers must provide a confirmation of non-filing dated on or after October 1, 2019. A confirmation of non-filing can be obtained from the IRS using Form 4506-T and checking box 7or by registering online at <https://www.irs.gov/individuals/get-transcript>. If unable to obtain verification of non-filing from the IRS, the non-tax filer can submit a signed statement certifying that they attempted to obtain confirmation, but was unable to obtain the required documentation. For non-tax filers, the statement **must also** confirm that they have not filed and are not required to file a tax return for the relevant year, and it **must** list sources and amounts of any income earned from work.

# Verification of **2019** Income for Individuals with Unusual Circumstances

## Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year **2019** must provide:

- A **signed** copy of the **2019** IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with IRS; **AND**
- A **2019 Tax Return Transcript** (that will only include information from the original tax return); or
- a **signed** copy of the 2019 income tax return and applicable schedules; or
- IRS DRT information on an ISIR record with all tax information from the original tax return. (DRT Flags 02 or 07)

## Individuals Who Were Victims of IRS Tax-Related Identity Theft

A victim of IRS identity theft who has been unable to obtain a 2019 **IRS Tax Return Transcript** or use the IRS DRT must provide:

- A Tax Return DataBase View (TDRBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2019 income tax return and applicable schedules the individual filed with the IRS; **AND**
- A statement signed and dated by the tax filer indicating that he or she was victim of IRS tax-related identity theft and the IRS is aware of the tax-related identity theft.

## Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with a 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.

## 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 the IRS's approval of an extension beyond the automatic six-month extension for tax year 2019;
- Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2020 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- 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.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2019 tax account information.