

SPECIAL CIRCUMSTANCES FOR TAX RETURN FILERS

AMENDED FEDERAL TAX RETURN

If a filer completed an amended tax return, the financial aid office will need a SIGNED copy of the original IRS tax return filed or an IRS Tax Return Transcript **and** a SIGNED copy of the filed 1040x.

JOINT TAX RETURN FOR SEPARATED, DIVORCED OR WIDOWED INDIVIDUALS

If a filer completed a joint tax return but is now single because of a divorce, separation, or death of spouse, the W-2 forms for all income showing on the tax return transcript are required. A tax return transcript is required; **the IRS Data Retrieval Tool will be insufficient in this situation.**

FILING EXTENSION

If you have been granted a filing extension from the IRS, you must submit:

1. A copy of IRS Form 4868 (Application for Automatic Extension of Time to File U.S. Income Tax Return—automatic 6 month extension) or a copy of the IRS approval of an extension beyond the six month extension
2. Copies of all W-2 forms and income documentation

After the actual tax returns are submitted, you must use the IRS Data Retrieval Tool at www.fafsa.gov to provide any corrections to your estimated information or submit an IRS tax return transcript to our office. These corrections may result in a change in your financial aid eligibility. **If the completed tax returns are not submitted after the expiration of the extension, no further financial aid will be disbursed until the necessary documents are received and reviewed.**

INSTRUCTIONS FOR USING THE IRS DATA RETRIEVAL TOOL ON THE FAFSA

If you have not already used the tool:

- Go to FAFSA.gov and log in to your FAFSA record
- Select “Make FAFSA Corrections”
- Go to the **Financial Information** section of the form.
- Follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool and select **Link to IRS**.
- Enter in required fields and submit. Once information populates, check the box allowing the above information to transfer to the FAFSA and select **Transfer Now**. Make sure you and your parent have **signed and resubmitted** the FAFSA.

INSTRUCTIONS FOR RETRIEVING TAX TRANSCRIPTS

- Go to www.irs.gov
- Under Tools click on Get Transcript of Your Tax Records
- Click on Get Transcript ONLINE
- If you already have an account, enter your user ID, if not click Get Started
- Once required information is entered, a confirmation code will be sent to your email address. Log into your email and enter the confirmation code listed
- Once all six steps are completed, under Select a reason you need a transcript select Higher Education/Student Aid
- Now download and print your Tax Transcript for the requested year