

## Providing IRS Tax Return Information

If your Free Application for Federal Student Aid (FAFSA) has been selected for review in a process called **verification**, you must verify the income and tax information reported on the FAFSA. If you and/or your spouse or parent (if applicable) filed a tax return for the year referenced in the FAFSA, you must provide your tax information using one of the following methods.

### Preferred Method

#### Use the IRS Direct Data Exchange (FA-DDX) in the FAFSA

(quickest method available)

The IRS Direct Data Exchange (FA-DDX) transfers required federal tax information (FTI) from the Internal Revenue Service (IRS) into the FAFSA for a contributor (student, spouse, and/or parents, as appropriate). The FA-DDX makes entering tax information easier and is **required for all FAFSA contributors** in order to transfer their tax information or non-filing status.

Why use the FA-DDX?

- **CONSENT IS REQUIRED:** As a condition of eligibility for federal student aid, **all FAFSA contributors are required to provide consent and approval each year** for the U.S. Department of Education to attempt to obtain FTI via the FA-DDX (even if they did not file a federal tax return or filed a foreign tax return, and even if they do not have an SSN).
- **FAST:** Immediate exchange of federal tax information in near-real time from within the online FAFSA form.
- **ACCURATE:** Secure transfer of federal tax information directly from the IRS into the FAFSA, eliminating the need to self-report most income and reducing the likelihood of schools requesting additional documentation to verify income.

**Most FAFSA contributors will be eligible to use the FA-DDX; which includes both tax filers and nontax filers.** However, there are some scenarios in which a FAFSA contributor will be **ineligible** to use the FA-DDX, such as:

- The FAFSA contributor did not have a **fully verified StudentAid.gov account (FSA ID)** in advance of filing the FAFSA form.
- The FAFSA contributor's **tax return was filed with a spouse to which they are no longer married.**
- The FAFSA contributor has filed a **Puerto Rican or foreign tax return.**
- The FAFSA contributor has been flagged by the IRS for **fraud or identity theft.**
- The FAFSA contributor is a federal **non-tax filer with foreign income.**
- The FAFSA contributor's **tax return has not yet been fully processed by the IRS** in advance of filing the FAFSA form.

If a FAFSA contributor is ineligible to use the FA-DDX, they will be required to **manually** enter their income and tax information into the FAFSA. Note that contributors who file a foreign tax return must still have an FSA ID and provide consent to complete the FAFSA online.

To complete the FAFSA verification process, contributors who were ineligible to use the FA-DDX and manually entered their income and tax information in the FAFSA will also be asked to provide documentation of the tax return information filed with the IRS to Student Financial Services (see Alternative Methods on page two).

#### How to use the FA-DDX

Students and parents who are eligible to use the FA-DDX will access it within the online FAFSA by following these instructions:

- **Log in** to your current FAFSA or start a new FAFSA at <https://studentaid.gov/>.
- When prompted, **each contributor must provide consent and approval** for the U.S. Department of Education to retrieve and disclose federal tax information via the FA-DDX.
- Once consent and approval have been provided, the **transfer of tax information will begin.**
- Consent and approval will remain in place for the duration of the award year and **must be provided every year** the FAFSA form is completed.

## Alternative Methods

### Submit Copies of IRS Tax Return Documents

(if unable to use FA-DDX)

Contributors who are ineligible to use the FA-DDX will need to enter their tax return information manually into the FAFSA and provide documentation of the tax return information filed with the IRS to complete the verification process.

**Alternative Method 1** – Order a **Tax Return Transcript** from the IRS for the tax year referenced in the FAFSA:

- Get Transcript Online – Instant access to download/print once registered and authenticated with the IRS.
- Get Transcript by Mail – Most mail delivery requests are processed within approximately 5 to 10 business days.

**Alternative Method 2** – Submit a **signed copy of the Tax Return (Form 1040)** and **applicable Schedules** filed with the IRS for the tax year referenced in the FAFSA.

### Alternative Method 1

#### Order IRS Tax Return Transcript

Get Transcript Online: (order transcript for the **tax year referenced in the FAFSA**)

- **Order Online** – Go to [www.irs.gov](http://www.irs.gov) and select **Get Your Tax Record**. Once you have reviewed and gathered the information needed to register and use the online transcript ordering service, select **Get Transcript Online**. Enter the required data and proceed to request a **Tax Return Transcript**. Upon successful completion of the IRS's rigorous identity authentication process, proceed to order, download and print a free copy of your **Tax Return Transcript**.

Get Transcript by Mail: (order transcript for the **tax year referenced in the FAFSA**)

- **Order by Phone** – Call the automated line at **1.800.908.9946** and follow the prompts to request a **Tax Return Transcript**. Once validated, the transcript will be mailed to the address on file with the IRS within 5-10 calendar days. *(If a joint tax return was filed, only the primary taxpayer on the joint return may use this tool.)*
- **Order Online** – Go to [www.irs.gov](http://www.irs.gov) and select **Get Your Tax Record**. Once you have reviewed and gathered the information needed to use the request by mail service, select **Get Transcript by Mail**. Enter the required data and proceed to request a **Tax Return Transcript**. Once validated, the transcript will be mailed to the address on file with the IRS in 5-10 days. *(If a joint tax return was filed, only the primary taxpayer on the joint return may use this tool.)*
- **IRS Form 4506T-EZ** – Go to [www.irs.gov](http://www.irs.gov) and select **Find Forms & Instructions**. In the box located under **Forms, Instructions, and Publications Search**, type **4506T-EZ** to easily locate the form. From the search results, open **Form 4506T-EZ** (Short Form Request for Individual Tax Return Transcript). Complete lines 1a – 5 as indicated. In line 6, enter the appropriate year(s) of the return transcript you are requesting. Sign/date and submit Form 4506T-EZ to the IRS at the address or fax # provided in the instructions on page 2 of the form. Once received by the IRS, the transcript will be mailed to the tax payer's address on file with the IRS within approximately 10 business days.

Amended Tax Return Filers: Students and parents who filed an *amended* tax return (IRS Form 1040X) for the tax year referenced in the FAFSA must also **submit a signed copy of Form 1040X filed with the IRS** to verify the correct data to report on the FAFSA.

### Alternative Method 2

#### Submit Signed Copy of IRS Tax Return and Schedules

Submit a **signed copy** of the **Tax Return (Form 1040)** and **applicable Schedules** filed with the IRS for the tax year referenced in the FAFSA. If a tax filer did not retain a copy of their tax return filed with the IRS, they may be able to obtain a copy of from the tax professional or software product used to prepare and file their return (if applicable).

Amended Tax Return Filers: Students and parents who filed an *amended* tax return (IRS Form 1040X) for the tax year referenced in the FAFSA must also **submit a signed copy of Form 1040X filed with the IRS** to verify the correct data to report on the FAFSA.