



### Office of Financial Aid

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## Income Verification Guidelines

Your Free Application for Federal Student Aid (FAFSA) has been selected for a process called verification. This process requires the Financial Aid Office to verify income information reported on the FAFSA. "You" on this form refers to the individual(s) whose tax information is being requested by the College. 2020-2021 Income Verification is based on income earned in **2018**.

### 2018 FEDERAL INCOME TAX FILERS

If you have filed a **2018** Federal Tax Return most individuals can verify their income in one of three ways:

#### 1. IRS Data Retrieval (Preferred Method)

- Log in to the student's FAFSA at [fafsa.gov](https://fafsa.gov) and proceed to the Financial Information section.
- If you are eligible, click "Link to IRS" and choose "Proceed to IRS Site". Enter your address exactly as it appears on your **2018** federal tax return and click "Submit". Check the "Transfer My Tax Information into the FAFSA Form" box and click "Transfer Now". **The data that was transferred from the IRS will be masked for your protection.** You will receive a message stating that the tax information was successfully transferred.

#### 2. Tax Return Transcript

- **Online:** Go to [irs.gov](https://irs.gov). Click "Get Your Tax Record". Click "Get a Transcript Online" OR "Get Transcript by Mail". When you get to the "Get Transcript" screen, be sure to select "Return Transcript" for **2018**. Once received, be sure to submit **all** pages to our office.
- **Mail:** Complete Form 4506-T (Request for Transcript of Tax Return) and mail it to the IRS. This form is available at [irs.gov](https://irs.gov) under "Forms & Instructions". Be sure you send **all** pages as the mailed transcripts are double sided.
- **Phone:** Call 1-800-908-9946. You will be put through a series of prompts to place your order. Be sure you request a "Tax Return Transcript".

**3. Signed Copy of 2018 Federal Tax Return** A complete signed copy of the **2018** federal tax return that was submitted to the IRS (Signed 1040 including Schedules 1, 2 and 3).

### OTHER CIRCUMSTANCES

**2018 Non-Tax Filers** must complete a Non-Tax Filer Form which can be obtained at [www.annamaria.edu](http://www.annamaria.edu) in the "Financial Aid Documents" section. You must also provide an IRS Verification of Non-Filing Letter (instructions can be found at [www.annamaria.edu](http://www.annamaria.edu) in the "Financial Aid Documents" section).

**If you have filed an Amended Federal Tax Return for 2018** provide a signed copy of the 1040X *Amended U.S. Individual Income Tax Return* and an IRS Tax Return Transcript.

**If you have filed a 2018 Puerto Rico or foreign tax return** submit a signed and translated copy to our office.