



# LEHIGH UNIVERSITY®

## 2015-2016 Federal Income Verification Instructions

If you completed a 2015-2016 FAFSA and were selected by the U.S. Department of Education for verification and did not report all income tax information using the IRS Data Retrieval Tool, you are required to either revise your FAFSA application and use the tool to import all required information directly from the IRS or provide our office with the necessary tax transcripts which you can obtain from the IRS to verify the submission and accuracy of your 2014 IRS tax return. Students required to complete this verification will see unsatisfied requirements exist for federal verification of parent and/or student income within self-service banner.

### Instructions for using the IRS Data Retrieval Tool

1. Visit [www.fafsa.ed.gov](http://www.fafsa.ed.gov) and log in with your student information and PIN.
2. Select the "Make FAFSA Corrections" option to make a correction to your 2015-2016 FAFSA.
3. Select "Financial Information" on the application toolbar.
4. If you were required to file a 2014 federal tax return, make sure that your filing status reads "Already Completed". If you were not required to file a tax return select "Will Not File" as your filing status.
5. If your parents were required to file a 2014 federal tax return, make sure that their filing status reads "Already Completed". If your parents were not required to file a tax return select "Will Not File" as their filing status.
6. Click "Link to IRS."
7. Enter the requested information on the IRS website.
8. Once your identification has been validated, your IRS tax information will display. Check "Transfer My Tax Information into the FAFSA" and then click the "Transfer Now" button.
9. Make sure this process is completed for both the student and parent's tax information and that you did not change any of the imported data.
10. Submit your updated FAFSA.

If you have any questions regarding the IRS Data Retrieval Process, you may contact the Federal Student Aid Information Center at 1-800-4-FED-AID to speak with a qualified customer service representative.

Please be aware that not every applicant is eligible to use the IRS Data Retrieval Tool. Students who find one of the following conditions to be true will not be able to complete this process and must submit the necessary tax transcripts from the IRS.

- A married, independent applicant and spouse who filed separate tax returns
- If both custodial parents (of the dependent student) filed separate tax returns
- An applicant or applicant's parent who has had a change in marital status after the end of the tax year on December 31, 2014.
- The applicant, or parent or spouse, as applicable, who has filed an amended tax return.
- The applicant or the applicant's parent and/or spouse, who have an unpaid federal tax liability

## Instructions for obtaining an IRS Tax Return Transcript

Tax filers can request an IRS Tax Return Transcript of their 2014 IRS tax return, free of charge, by the following methods.

### 1. Online Request

- Visit IRS web site [www.irs.gov](http://www.irs.gov).
- In the Tools section of the homepage, click on "Order a Return or Account Transcript."
- Click "Order a Transcript."
- Enter the tax filer's Social Security number, date of birth, street address, and ZIP Code or postal code. Use the address currently on file with the IRS. This is generally the address that was included on the latest return filed.
- Click "Continue."
- In the Type of Transcript field, select "Return Transcript" and, in the Tax year field, select "2014."
- Click "Continue."

### 2. IRS2Go App

- Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
- Google Play at <https://play.google.com/store/apps/details?id=gov.irs>

### 3. Telephone Request

- Available from the IRS by calling 1-800-908-9946
- Follow prompts to enter Social Security number and the numbers in the street address.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter "2014."

### 4. Paper Request Form

- Download and submit the IRS Form 4506T-EZ at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf> or the IRS Form 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>

## Instructions for obtaining an IRS Record of Account Transcript

IRS Record of Account Transcripts must be provided to the office of financial aid for income verification when amended tax returns have been filed with the IRS. IRS Record of Account Transcripts can only be requested by completing the IRS Form 4506-T to the IRS. IRS Form 4506-T can be downloaded at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>