



Albion College

Verification Guide 2019-2020

If you have been selected for Federal Verification for the 2019-2020 academic year, you must complete The Dependent or Independent Verification Worksheet. If you are unsure which worksheet to complete, please contact us at 517-629-0440. Federal Verification is a two-step process.

Step 1

Verifying Household Size for 2019-2020

Household verification looks at how many people qualify as living in the household. For qualifying household members please refer to the 2019-2020 Verification Form.

Step 2

Verifying Income for 2019 - 2020

Students who are selected for Verification for 2019-2020 are also required to confirm financial information on the FAFSA. There are three approved ways to complete this process for the 2019-2020 academic year. ***YOU WILL ONLY NEED TO COMPLETE ONE OF THE APPROVED WAYS. YOU DO NOT NEED TO COMPLETE ALL THREE.***

1. **IRS Data Retrieval Tool**
2. **IRS Tax Return Transcript**
3. **IRS Verification of Nonfiling statement - [IRS Form 4506-T](#)**

1.) IRS Data Retrieval Tool (preferred method)

As a part of the FAFSA, this is the best way to verify income. It allows most FAFSA applicants and parents the ability to transfer their income information from the IRS to the FAFSA.

Helpful hint: Have a copy of your tax return in front of you when you are using the IRS Data Retrieval Tool. When attempting to link to the IRS from the FAFSA, the student/family address must be typed exactly as it appears on your tax return. The examples below show the same address typed a variety of ways and could result in the Data Retrieval Tool not working. **Abbreviations and punctuation are very important!**

611 East Porter Street
611 E. Porter St.

611 East Porter St
611 E Porter St

- Go to www.fafsa.gov
- Log into the student's FAFSA using the student's FSA ID
- Select "Make FAFSA Corrections"
- Navigate to the Financial Information section from the tabs across the top of the screen
- Follow the instructions to determine if the student and/or student's parents are eligible to use the IRS Data Retrieval Tool to transfer 2017 IRS Income Tax Information
- If the student and/or parent(s) are eligible to use the IRS Data Retrieval Tool, link to the IRS Database. Enter the address exactly as it appears on the student/parent tax forms.
- After the information is loaded, click the box for "transfer my tax information into the FAFSA" and then hit "Transfer Now"

IRS.gov [Return to FAFSA](#) | [Log Out](#) | [Help](#)
[Español](#)

Federal Income Tax Information

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the Department of Education (ED) to populate any applicable FAFSA® questions. For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

Tax Year	Type of Return Filed	Untaxed Pensions
Name(s)	Adjusted Gross Income	Untaxed IRA Distributions
Social Security Number	Income Earned from Work	Tax exempt Interest Income
Filing Status	Income Tax	IRA Deductions and Payments
IRS Exemptions	Education Credits	Status of Amended Returns Received

Refer to your tax records if you have a question about the values you reported.

Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA ?

The tax information provided to FOTW will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

Do Not Transfer My Tax Information and Return to the FAFSA ?

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA.

Transfer Now ?

Do Not Transfer ?

[IRS Privacy Policy](#)

- After the data is successfully transferred, both the student and parent may be asked to sign the FAFSA again using their FSA IDs and passwords. Submit the FAFSA for the transferred information to be sent to the selected colleges.

2.) IRS Tax Return Transcript

Some families will not be able or may choose not to use the IRS Data Retrieval Tool. To verify income for these families, the student and/or parent must submit a **2017 IRS Tax Return Transcript**. Some examples of those who will not be able to use the IRS Data Retrieval Tool are:

- Married couples who filed separate tax returns for 2017
- Students and/or student's parent(s) whose marital status has changed as of January 1, 2017.

To obtain a **2017 IRS Tax Return Transcript**:

- Call 1.800.908.9946 -- or -- Go to www.irs.gov/Individuals/Get-Transcript

You can get various Form 1040-series [transcript types](#) online or by mail. If you need your prior year **Adjusted Gross Income (AGI)** to e-file, choose the **tax return transcript** type when making your request. If you only need to find out how much you owe or verify payments you made within the last 18 months, you can [view your tax account](#).

The method you used to file your tax return, e-file or paper, and whether you had a balance due, affects your [current year transcript availability](#). **Note:** If you need a photocopy of your return, you must use [Form 4506](#).

Get Transcript Online

Get Transcript by Mail

If you chose to email the forms to our office, please use an encrypted email or block out any social security numbers on the forms. Please make sure the student's name and Albion College Student ID Number are printed on the form.

3.) Tax Return Non-Filers

If an independent student or parent(s) of a dependent student did not file and were not required to file a 2017 Federal Tax Return, the student and/or parent(s) must provide the Office of Student Financial Services with a statement from the IRS that confirms they did not file taxes in 2017. To receive this statement, the student and/or parent must submit [IRS Form 4506-T](#) to the IRS. Directions for submitting the form to the IRS Office are on the 2nd page of the form.

Additionally, the student and/or parent(s) must provide copies of all W2s for any income earned during 2017.

On the form, complete the top section and check the box for #7, indicating you are requesting verification of non-filing. For #9, enter 12/31/2017 to request verification of nonfiling for the 2017 tax year.

Directions for submitting the form to the IRS office are on the 2nd page of the form. Do not submit this form to Albion College.

Special Cases for Verifying Income

Amended Tax Returns

If the student or student's parent(s) amended their 2017 Federal Tax Return, they must submit the following to the Office of Student Financial Services:

- A signed copy of the original 2017 income tax return filed with the IRS
- A copy of their 2017 Tax Return Transcript
- A signed copy of IRS Form 1040X filed with the IRS

Victims of Identity Theft

If the student or student's parent(s) have been notified by the IRS that they are a victim of tax-related identity theft, they will not be able to use the IRS Data Retrieval Tool or request a tax return transcript. Instead, they will need to request a 2017 Tax Return Database View Transcript of their tax return. A copy can be requested by calling 1.800.908.4490.

Additionally, the student or parent(s) will need to provide a signed and dated statement indicating that they are a victim of tax-related identity theft and that the IRS has been made aware of the situation.