

OBTAINING INCOME TAX INFORMATION

If income tax information is required, use one of the following **EIGHT** options to obtain this information.

OPTION 1: Use the IRS Data Retrieval Tool on the FAFSA *(not everyone is eligible for this option)*

If you or your parent(s) filed an amended tax return – a signed copy of the 1040X must also be submitted to WCC.

1. Student logs into their FAFSA at www.fafsa.gov
2. Click on “**Make FAFSA Corrections**”
3. Click on “**Financial Information**” tab (for parent or student, or both)
4. Change status to “Already Completed” if says otherwise
5. A list of questions will appear. You must answer “**none of the above**” to use the IRS transfer
6. **If you are eligible** to use the IRS Data Retrieval Process, select “**Link to IRS**” and click **OK**
7. On the IRS Web site, enter the requested information and click submit
 - Enter name, address and filing status **EXACTLY** as it appears on your Federal Tax Return
8. Click the box under the “**Transfer My Tax Information into the FAFSA**” and then click “**Transfer Now**”
9. You should then receive a message “You have successfully transferred your tax information”
10. **Be sure to scroll down and finish going through all the steps and electronically sign** (if dependent student, one of your parents also need to electronically sign) **and submit your FAFSA. You are not finished until you have successfully submitted your FAFSA and received a confirmation number.**

OPTION 2: Submit an IRS Tax Return Transcript *(account transcripts will NOT be accepted)*

If you or your parent(s) filed an amended tax return – a signed copy of the 1040X must also be submitted to WCC.

1. Go to www.irs.gov
2. Click “Get Your Tax Record” box
3. Click either “Get Transcript Online” box or “Get Transcript by Mail” box:
 - A. **To get transcript online:** *(first time users will need to create an account, takes ~15 minutes)*
 1. Once account is created or when you log in, on the “Get Transcript” page:
 - Select a reason you need a transcript: Higher Education/Student Aid
 2. Click on the correct year needed under “**Return Transcript**” box
 - B. **To get transcript by mail:**
 1. Enter in your information EXACTLY as it appeared on your Federal Tax Return. *If you filed taxes jointly with a spouse, the return transcript will be under the Primary Taxpayer as shown on your tax return & their information will need to be entered. Otherwise, they will send you an account transcript, which will not be accepted in place of the Return Transcript.*
 2. Under “Type of Transcript”, select **RETURN** Transcript
 - Under “Tax Year”, select the correct year needed
 3. You should see a confirmation saying that they have accepted your request and should allow 5-10 days to receive

*If you have any issues getting the transcripts, call **1-800-908-9946** to use the automated process to have one mailed to the address listed on form when you filed.*

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OPTION 3: If you will not file or were not required to file a tax return, submit the following:

1. An IRS Verification of Non-filing Letter, IRS Form 4506T, **AND**
2. If applicable, a copy of IRS Form W2 for each source of employment income received

OPTION 4: If you filed an amended tax return, submit ALL of the following:

1. A signed copy of the original IRS income tax return that was filed with the IRS; **AND**
2. An IRS Tax Return Transcript; **AND**
3. A signed copy of IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was sent to the IRS
 - a. If you do not have a 1040X, you must submit the “Record of Account Transcript” from IRS

OPTION 5: If you do not have a Social Security Number (SSN), an Individual Taxpayer Identification Number (ITIN), or an Employer Identification Number (EIN), and therefore, you are unable to obtain a Verification of Non-filing Letter from the IRS, submit the following:

1. Request from WCC the Non-Filer Statement Form certifying (a) that you do not have a SSN, an ITIN, or an EIN and (b) that names each source, amount of earnings, other income, and resources that supported you during the year; **AND**
2. If applicable, a copy of IRS Form W2 for each source of employment income received

OPTION 6: If you were a victim of identity theft & cannot obtain a tax transcript, submit BOTH of the following:

1. A Tax Return DataBase View (TRDBV) transcript obtained from the IRS. (Contact the IRS at 1-800-908-4490.); **AND**
2. A statement signed and dated by the tax filers indicating that they were victims of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft **OR** a letter from the IRS stating you are a victim of identity theft

OPTION 7: If you filed a Non-IRS or foreign tax return:

1. Submit a signed, dated copy of the form, the form must be translated into English, **OR**
2. Submit a statement of income, if you earned income in a country that does not require you to file tax returns

OPTION 8: If you were granted a filing extension, submit all of the following:

1. A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for that tax year;
2. A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for specified tax year; **AND**
3. A copy of W2 for each source of employment income received for specified tax year and, if self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for specified tax year