IF YOU FILED A 2019 FEDERAL TAX RETURN

To verify information on the FAFSA, Student Financial Services is requesting 2019 tax information for either you, your parent(s), or both. Please note that if the student or parent are married, we must receive tax data for their spouse as well.

As of January 2019, it has been determined by the Department of Education that we may accept any of the following three options to satisfy this requirement:

A) Use of the **FAFSA IRS Data Retrieval Tool** to transfer tax information directly to the FAFSA (Option 1 below) OR

B) A copy of the official **2019 IRS Tax Return Transcript** (Options 2, 3 or 4 below) OR

C) A signed copy of the **2019 Federal IRS Tax Return** and all applicable schedules.

IF YOU DID NOT FILE A 2019 FEDERAL TAX RETURN

And were not required to file 2019 taxes:

A) Submit an official IRS Verification of Non-filing Letter (Options 2, 3 or 4 below) OR

B) Complete either a Parent Certification of Non-filing Form or Student Certification of Non-filing form

Because you filed an extension for your 2019 tax return and have still not filed:
Please contact us at 877-846-5755 or psu-sfs@plymouth.edu for additional information of documentation required to confirm your extension was granted beyond October 2020.

IF WE REQUESTED A 2019 1040X AMENDED TAX RETURN:

A) Upon receipt of your 2019 Tax Information, it came to our attention that an error was made (ex: tax filing status of Head of Household, missing W2, etc.) and we require that you correct the error by completing an IRS Form 1040X Amended Tax Return and submitting a signed copy to our office.

B) It was reported by the IRS that a change was made to your original tax return. Submit a signed copy of your IRS Form 1040X Amended Tax Return in addition to a copy of your original IRS Tax Return.

In some cases, the IRS may have made corrections to your tax return for you and you did not file an IRS Form 1040X. If that is the case, we require the following:

1. A copy of a letter or notice from the IRS indicating the changes the IRS made to your tax return data.
2. An IRS Tax Account Transcript, which shows any amended tax items. (Options 2, 3 or 4 below)
3. An IRS Record of Account Transcript which shows the original tax return information and any changes that were made to it. (Options 2, 3 or 4 below)

IMPORTANT NOTICE:

PSU requires all students/families to complete Verification four weeks prior to the end of the term for which aid is requested (November 2021 for students applying for aid during Fall 2021 term or April 2022 for students applying for aid during Spring 2022 term.) Please note that while we can process financial aid at any time during the academic year, term bills MUST be paid on time to avoid late fees or the student being removed from their classes.

Official IRS Transcripts or other documentation may be emailed to psu-sfs@plymouth.edu, faxed to 603-535-2627, or mailed to Student Financial Services at 17 High St, MSC 19, Plymouth NH 03264. If you have additional questions, please contact us at 877-846-5755.

Option 1: IRS Data Retrieval Tool within the FAFSA

1. If you have not already used the IRS Data Retrieval Tool (DRT) to enter 2019 tax information into the 2020-2021 FAFSA, the requirement can be satisfied by updating and making a correction to the FAFSA and using the online DRT. If you're unable to use the DRT, the requirement can be satisfied by requesting an official Federal Tax Return Transcript from the IRS or submitting a signed copy of the tax return.
2. Go to the **Financial Section of the FAFSA**. Under Tax Information for either parent and/or student select "already completed" and then choose correct tax filing status.
3. Click on the blue **Link to IRS** button. Parents will be required to indicate if they are listed as Parent 1 or Parent 2 on the FAFSA and to enter the FSA ID and password.
4. Click blue **Proceed to IRS Site** button. You will then be redirected to the IRS website for completion of the DRT.
5. When typing in your address on irs.gov, please be sure that it is the **exact address on your return.** "Street" vs "St." could make a difference in whether the IRS can locate your information. When completed, click **Submit.**
6. The DRT will now show you the fields from your tax return which will be transferred to the FAFSA. It will not show you the financial data, however. Check the box on the left directly below "**Transfer My Tax Information into the FAFSA**" and then click the "**TRANSFER NOW**" button on the right.
7. After successfully linking your IRS data to the FAFSA, you will be returned to the FAFSA form. If parents are "Married-Filing Jointly," you must update income earned by Parent 1 and income earned by Parent 2.
8. Changes to the FAFSA are not sent to PSU until you continue to the **"Sign & Submit"** section of the FAFSA. Complete all of the fields required and press "**Submit my FAFSA Now**."

Option 2: IRS Tax Return Transcript Request via IRS website

On the IRS website (IRS.gov) click on "**Get My Tax Record.**" There will be two options: **Get Transcript ONLINE** and **Get Transcript by MAIL**. (**NOTE**: The **'online'** option requires a cell phone billed in your name and for you to verify your identity by answering questions about items on your credit report. Some families have found this process to be difficult and confusing. If you do not know this information or feel uncomfortable providing it, please use the '**Get Transcript by MAIL'** option.)

Get Transcript by MAIL

1. From the main IRS landing page click on the blue "Get Your Tax Record" button to the right.

2. Click 'Get Transcript by Mail' button

3. A government warning message pops up, click 'OK'

4. Enter the tax filer's information and click 'Continue'

Please note*: If "married, filing jointly" then the person requesting the transcript must be the partner listed first on the tax return.*

5. In the "**Type of Transcript"** field, select "**Return Transcript**." In the **Tax Year** field, select "**2019**."

6. If the IRS successfully confirms your address tax filers can expect to receive a paper IRS Tax Return Transcript or Verification of Non-Filing at the address included in their online request within 5 to 10 days.

Get Transcript ONLINE

1. Click on Blue "Get Transcript ONLINE" button to the left.

2. Choose "Create Account" if this is your first time using this service or enter your 'Username' if you already have an account.

3. To create an account the IRS will need verify your identity, they will need a number from ONE of your financial accounts. You can use any of the following: Credit Card **OR** Student Loan **OR** Mortgage or Home Equity Loan **OR** Home Equity Line of Credit **OR** Auto Loan. You will also need a valid email address AND a mobile device. Your phone must be a U.S.-based mobile phone number registered in your name and able to receive text messages. It may **NOT** be a landline, Skype, Google Voice, or a virtual number.

4. Enter Name and email as requested and click 'Send CODE'

5. The IRS will send an email with an eight digit security code. Enter this code in the box (with hyphen) and click 'continue'.

6. Update your personal information as requested and click "Continue." Follow directions as indicated.

7. To complete the process the IRS will send a text to the mobile device listed with an eight digit security code. Enter this code in the box (with hyphen) and click enter.

Option 3: IRS Tax Return Transcript Request by PHONE

1. Available from the IRS by calling 1-800-908-9946
2. Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally, these will be the numbers of the street address that was listed on the latest tax return filed.
3. Select "**Option 2"** to request an IRS Tax **Return Transcript** and then enter "**2019**", OR
4. Select "**Option 3"** to request an IRS Tax **Return Transcript and an IRS Tax Account Transcript** then enter "**2019**".
5. Tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request within 5 to 10 days from the time the IRS receives the request.

Option 4: IRS Tax Return Transcript Request by MAILING IRS FORM 4506-T

1. Download the form at IRS.gov. This request should be ***FREE.*** If the form indicates there is a $50 charge**, please ensure that you are using Form 4506-T and not 4506.**
2. Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4.
3. Line 5 – leave blank.
4. On Line 6, enter the type of tax return filed (1040, 1040A, 140EZ) and then check the box on the right across from 6a for a Return Transcript.
5. For Verification of Non-filing, check the box on the right across from Line 7; for W2 Transcripts, check the box across from Line 8.
6. On Line 9, indicate that you are requesting information for the **tax year ending 12/31/2019**
7. The tax filer must check the signatory box, enter their telephone number, and sign and date the form. Only one signature is required to request a transcript for a joint return.