

# Confirmation of 2018 Tax Data

## Document Submission:

Email: [finaid@iit.edu](mailto:finaid@iit.edu)

Fax: 312.567.3982

Office of Financial Aid

Perlstein Hall, 206

10 W. 33<sup>rd</sup> Street

Chicago, IL 60616

Phone: 312.567.7219



[fb.com/FinAidIIT](https://www.facebook.com/FinAidIIT)

## Overview

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) was selected for review through a process called verification. **Verification** is the U.S. Department of Education's method of confirming data on your FAFSA and requires the Office of Financial Aid to collect various forms of documentation. After all documentation has been submitted, check your Illinois Tech hawk email regularly as our office may have follow-up questions about the information submitted.

## Instructions

### Option One (preferred): IRS Data Retrieval Tool

1. Log in to <https://studentaid.gov/h/apply-for-aid/fafsa>.
2. Update either the parent or student income section of your FAFSA using the IRS Data Retrieval Tool (DRT). The DRT allows parents or students to access IRS tax return data and transfer it directly to their FAFSA.
3. Submit your FAFSA and wait up to one week before your Parent or Student Tax Return Transcript requirement is waived.

### Option Two: Submit a Tax Return

1. Locate your or your parent(s)' 2018 tax return. Confirm that the return is either signed by a tax preparer or signed and dated by the tax filer(s).
2. Submit the tax return along with your CWID to the Office of Financial Aid.

### Option Three: Submit a Tax Return Transcript

1. Go to <https://www.irs.gov/individuals/get-transcript>.
2. Select one of the two buttons below. Option A is only available if the user has a personal account number from a credit card, mortgage, or car loan as well as a personal mobile phone.
  - a. **Get Transcript Online**
    - i. New users will need to select Create Account to verify their identity. Returning users should log in.
    - ii. Indicate that you are requesting a transcript for Higher Education/Student Aid purposes. Leave the customer file number section blank.
    - iii. Select "2018" in the Return Transcript section.
    - iv. Download and save the letter as a PDF.
  - b. **Get Transcript by Mail**
    - i. Enter in the personal information requested and submit. Be sure to use the address currently on file with the IRS.
    - ii. Select "Return Transcript" as the transcript type and "2018" as the tax year. Leave the customer file number section blank. If the website is unable to process your request, please fill out a Request for Transcript of Tax Return at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> and mail it to the IRS.
    - iii. The documentation will be mailed in 5-10 business days from the date you submitted your request, or the date your Request for Transcript of Tax Return was received.
    - iv. Upon receipt of your documentation, make a copy for your records.
3. Submit the tax return transcript along with your CWID to the Office of Financial Aid.

***If you or your parent is married and did not file using the "married filing jointly status" in 2018, you should also submit your or your parent's spouse's tax return/tax return transcript.***