

Spouse 2017 Tax Information

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of [FAFSA on the Web](#). In most cases, no further documentation is needed to verify IRS DRT 2017 transferred income information if the FAFSA filer did not change the information.

If any of the situations below apply, review for the required documentation needed to verify income:

My spouse cannot or will not use the IRS DRT.

Provide a:

- Signed copy of the 2017 income tax return submitted to the IRS, or
- 2017 IRS Tax Return Transcript, or
- 2017 IRS Record of Account.

My spouse was granted a filing extension beyond the automatic six-month extension.

Provide:

- 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 tax year 2017;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2017;
- Verification of Non-filing Letter from the IRS dated on or after October 1, 2018;
- A copy of the IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2017 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income and the U.S. income tax paid for tax year 2017.

My spouse amended their 2017 tax return.

Provide:

- A signed copy of the 2017 income tax return submitted to the IRS, or 2017 IRS Tax Return Transcript; and
- A signed copy of the 2017 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," including any schedules or forms that was filed with the IRS; or
- 2017 IRS Record of Account

My spouse is a victim of IRS identity theft.

Provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; *and*
- A statement signed and dated by the tax filer indicating that they were a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

My spouse filed a non-IRS income tax return.

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax

return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

How to Request Your Tax Records From the IRS

- Save the transcript from the IRS website – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript Online.”
 - Make sure to select the correct IRS year and record type.
 - The transcript displays online upon successful completion of the IRS’s two-step authentication.
- Get Transcript by Mail – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript by Mail.”
 - Make sure to request the correct IRS record type.
 - The transcript is generally received within 10 business days from the IRS’s receipt of the online request.

If you are unable to obtain your transcript through the IRS website then you may request one through:

- Automated Telephone Request – 1-800-908-9946.
 - Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
- Paper Request Form – IRS Form 4506-T. Go to www.irs.gov, click “Search Forms & Instructions.” Enter the form name in the search bar.
 - The transcript is generally received within 10 business days from the IRS’s receipt of the paper request form.