CT STATE
COMMUNITY COLLEGE

# Providing Income and Tax Information When Your FAFSA is Selected for Verification
# Award Year 2025-26

Students who complete the Free Application for Federal Student Aid (FAFSA) may be asked to provide income or tax documentation for themselves as well as their spouse/partner or parents, if selected for a review process known as Verification. Your FAFSA has been selected for this review and additional documentation is needed.
Depending on the filing status reported on your FAFSA application, it may be necessary to provide a Tax Return Transcript, a signed copy of your tax return or a signed and dated statement for non-filing. If applicable, these items may also be required for your spouse/partner or parents (if considered "dependent" on your FASFA application).

**Reported Filing Status: Already Completed or Will File**
If you, your spouse/partner or parents (if applicable) reported that they have already completed or will file their income tax return on the FAFSA, it is best to verify income and tax information by using the Future Act Direct Data Exchange (FA-DDX) that is part of FAFSA on the Web at studentaid.gov. In most cases, no further documentation is needed to verify income information that was transferred using the FA-DDX. To be able to use the direct data exchange, an income tax return must have already been processed by the IRS. Applicants, spouses/partners and parents, as appropriate, will be required to provide consent to transfer tax information via the FA-DDX into the FAFSA application.

In the case you, your spouse/partner or parents (if applicable) do not have tax information available or are unable to use the FA-DDX, a Tax Return Transcript must be provided.

**Reported Filing Status: Will Not File**
If you, your spouse/partner or parents (if applicable) did not file and are not required to file, but earned income in 2023, a signed, dated statement listing sources of earned income, certifying you have not filed and are not required to file, must be provided.

**Obtaining a Tax Return Transcript:**
The IRS Tax Return Transcript can be obtained from the IRS by telephone, online or by mail. Below are instructions on how to obtain this documentation.

- **Automated Telephone Request:** 1-800-908-9946
  - Provide the primary filer's Social Security Number, date of birth and address used when filing
- **Online Request**: https://www.irs.gov/
  - On the IRS homepage, click "Get Your Tax Record"
  - Choose one option: "Get transcript online" or "Get transcript by mail"
  - Selecting "Get transcript online" will require you to create an account or log in
  - Provide the primary filer's Social Security Number, date of birth and address used when filing
  - Request the **"Return Transcript"** for tax year **2023**
- **Paper Request Form:** IRS Form 4506-T: Request for Transcript of Tax Return
  - Download IRS Form 4506-T at https://www.irs.gov/pub/irs-pdf/f4506t.pdf
  - Fill in top section of form line 1a to 5b
  - Line 6: Check the box for (a) Return Transcript
  - Line 9: Year or period requested, enter **"12/31/2023"**
  - Mail the completed form to the address indicated on page 2

**Availability of Filing Information from the IRS:**

In most cases, filers of electronic tax returns have information available within 2-3 weeks after those returns have been accepted by the IRS. For paper tax return filers, it may take 6-8 weeks for information to become available. Additional time may be required if income tax is owed.

**Special Cases:**

- If the student or parent made a mistake on the FAFSA (including tax filing status), log into studentaid.gov select "Log In To Edit Existing Forms," and update as needed.

- If an **amended** (i.e., changed) IRS income tax return has been filed, (in most cases) the updated income tax information will transfer using the FA-DDX. If the tax information is unavailable or cannot be used, provide a signed copy of the 2023 IRS Form 1040X "Amended US Individual Income Tax Return" and one of the following:
    - Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
    - A transcript obtained from the IRS that lists 2023 tax account information of the tax filer(s) or
    - A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS

- Victims of **IRS tax-related identity theft** should provide a signed copy of their 2023 income tax return with applicable schedules AND an IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer stating that he or she was a victim of tax related identity theft and that the IRS is aware of it.
    - Contact the IRS' Identity Protection Specialized Unit at 1-800-908-4490 for more guidance as needed.

- **Contact the Financial Aid Office** at your campus if any of the following applies to you:
    - The student and/or parents (if student is dependent) had a **change in marital status** since tax filing
    - **Married tax filers** (student or parent) **filed separately**
    - Individuals were **granted a filing extension by the IRS** beyond the automatic six-month extension
    - Student or parent (if student is considered dependent) **filed non-IRS income tax returns**

Please contact the Financial Aid Office at your campus if you have any questions.