2026–2027

Verification of 2024 Income Information for Parent Tax Filers

Important Note: The instructions below apply to each parent (or stepparent, if applicable) included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2024.

Instructions: Complete this section if the parents filed or will file a 2024 IRS income tax return(s). As part of Federal student aid eligibility, parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the parents filed separate 2024 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2024 income tax return information for the parents was not transferred via the FA-DDX and considered verified, the parents should provide the institution with a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules**.

A **2024 IRS Tax Return Transcript** may be obtained through:

- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Sign in to your online account." Make sure to request the "Return Transcript" and ***NOT*** the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the ID.me IRS Help Site.
- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and ***NOT*** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- 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 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2024 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2024 must provide:

- A signed statement listing the sources of any 2024 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2024;
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2024; 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 tax year 2024.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2024 must provide a signed copy of the 2024 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:

- Income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2024 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2024 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A copy of the signed 2024 income tax return and applicable schedules the individual filed with the IRS, or an equivalent document provided by the IRS; ***and***
- An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if the institution questions the accuracy of the information on the signed copy of the income tax return, the tax filer must provide the institution with a copy of the tax account information issued by the relevant tax authority before verification can be completed.