

As part of the verification process, the US Department of Education requires students to provide income documentation directly from the Internal Revenue Service (IRS). (If a student is considered dependent for financial aid purposes, the student's parents must also provide income information.) **Photocopies of federal or state tax returns are NOT acceptable.** There are two options for providing income information:

### Option 1: IRS Data Retrieval Tool (preferred option)

On the FAFSA website, use the IRS Data Retrieval Tool to link your FAFSA directly with the IRS to retrieve 2014 income information. The IRS Data Retrieval Tool is the fastest, easiest and most secure method for meeting this requirement.

If you filed your taxes electronically with the IRS, you can use the tool *2-3 weeks* after you have filed your taxes. If you filed a paper tax return, you can use the tool *6-8 weeks* after you file your taxes.

To use the IRS Data Retrieval Tool, follow these steps:

1. Go to: [www.fafsa.gov](http://www.fafsa.gov) and log in to your FAFSA
2. Select: Make FAFSA Corrections
3. Select: Financial Information and follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool.

Tax Filers who meet any of the following conditions *cannot* use the IRS Data Retrieval Tool and must request an IRS Tax Return Transcript (see below):

- The tax filers are married and filed separate tax returns; or
- There was a change in the tax filer's marital status after December 31, 2014; or
- Income information on the FAFSA was changed after using the IRS Data Retrieval process; or
- The tax filer filed an amended tax return. Tax filers who filed an amended tax return must submit *both* an IRS TAX RETURN TRANSCRIPT *and* the 1040X Federal Form Signed.

### Option 2: Tax Return Transcript

Request a Tax Return Transcript directly from the IRS only if you are unable to use the IRS Data Retrieval Tool.

To request an IRS Tax Return Transcript, follow these steps:

1. Go to: [www.irs.gov](http://www.irs.gov)
2. Select: "Get Transcript of Your Tax Records"
3. Select: "Get Transcript immediately" Enter your Social Security number, date of birth, and the address on file with the IRS.
4. Follow the security prompts to retrieve the transcript online
5. Make sure to select Return Transcript

Send the Tax Return Transcript to the MECA Financial Aid Office as soon as you receive it. Be sure your name and Social Security number appear on all pages of all tax transcripts sent to MECA so that it can be added to your file (including spouse or parent tax return transcripts, if applicable).

### **Who must provide income information?**

**The student**, if required to file a federal tax return.

**The student's spouse**, if the student was married at the time the FAFSA was filed and the spouse is required to file a federal tax return. Spouse income documentation is necessary even if the student was not married in or the student or spouse filed separately. *Be sure the student's name and SSN appear on the tax transcript.*

**The student's parent**, if parent information was provided on the FAFSA and the parent is required to file a federal tax return. *Be sure the student's name and SSN appear on the tax transcript.*

**The student's parent's spouse**, if the parent was married at the time the FAFSA was filed, even if s/he was not married in and filed separately. *Be sure the student's name and SSN appear on the tax transcript.*

### **Other important information:**

- Review of your financial aid application cannot proceed until the MECA Financial Aid Office receives all of the appropriate information to complete verification on your file.
- Be sure your name and Social Security Number appear on all pages of all tax transcripts sent to MECA so that it can be added to your file (including spouse or parent tax transcripts, if applicable).
- You may send transcripts to the Financial Aid Office by mail, fax, and e-mail or deliver them in person.