

## **IRS TAX DOCUMENTATION PROCESS INSTRUCTIONS FOR 2016 FILERS**

**NOTE: We are unable to accept a copy of your original 1040, 1040A, or 1040EZ federal tax return(s).**

You have two options for completing the IRS Tax Documentation process requirement if you filed or are required to file a 2016 IRS federal tax return. The preferred method is Option 1 – IRS Data Retrieval Tool (DRT) which is done through the FAFSA. If you are unable to use the IRS Data Retrieval Tool, you can then use Option 2 – Requesting a Tax Return Transcript.

### **Option 1: FAFSA IRS Data Retrieval Tool (DRT) Instructions (Preferred Method)**

The preferred method is the IRS Data Retrieval Tool which is done through the FAFSA.

- If you successfully used the IRS Data Retrieval Tool when you filed your FAFSA, you have already completed this step. Please check your To-Do List on your MyClarion account to see if your and/or your parent(s)' Tax Return Transcript is listed. If not, then you have completed the tax documentation process.
- Please be sure you have selected your 2018-19 FAFSA and click on "Make FAFSA Corrections".
- Follow all log in prompts until you can click on the Financial Information tab listed across the top of your FAFSA.
- Parent tax information is first. Please select "Already Completed" in the drop down box when asked if you have filed a 2016 tax return. If you cannot answer already completed, then you will not be able to utilize the IRS Data Retrieval Tool at this time. **NOTE:** Independent students will not have a parent section.
- Answer "yes" or "no" to the next series of questions. If you answer "yes" to any of these questions, you will not be able to utilize the IRS Data Retrieval Tool at this time, and you will need to follow the Option 2 instructions.
- Enter parent FSA ID and click "Link to IRS". You will receive a message that you are leaving FAFSA on the Web because you are being redirected to the IRS website. Click OK.
- Once you are on the IRS webpage, enter the requested information exactly how it appears on your 2016 federal tax return. Example: 123 Clarion Drive on your tax return should **NOT** be entered as 123 Clarion Dr.
- Once the IRS validates your identification, your IRS tax information will display. You will then be given the option to transfer your information by checking the box and clicking "Transfer Now". You should receive the response "You have successfully transferred your 2016 tax information."
- Click "next" and follow the same steps to retrieve the student tax information before going to the last step.
- Once you have transferred tax information from the IRS to your FAFSA, **DO NOT CHANGE ANY OF THE TRANSFERRED ELEMENTS**. We can only accept information that is **UNCHANGED** since it is coming directly from the IRS.
- Complete the Sign and Submit section by entering your FSA ID to electronically sign your FAFSA and then click "Submit My FAFSA Now". You will know your FAFSA has been submitted successfully when you arrive at the Confirmation Page. You will receive a confirmation number and Expected Family Contribution (EFC) number.

### **Option 2: Tax Return Transcript Instructions**

If you are unable or choose not to use the IRS Data Retrieval Tool, please obtain an official 2016 Tax Return Transcript from the IRS. You can order a tax return transcript either online, by phone or by mail OR you can create an account on the IRS website and print off your tax return transcript instantly. If you are married and filed separate returns or if your biological parents live together and are not married, a tax return transcript is required for both parents.

- Go to [www.irs.gov/transcript](http://www.irs.gov/transcript) and click either "Get Transcript by MAIL" or "Get Transcript Online".
- If you click "Get Transcript by Mail", enter your social security number, date of birth, and address. Request a **2016 Return Transcript**. Please allow 5 to 10 days to receive your transcript by mail.
- If you click "Get Transcript Online", please follow all of the necessary identification prompts and be sure to request a **2016 Return Transcript**.
- You can also request a Tax Return Transcript by calling 1-800-908-9946 or by submitting IRS Form 4506-T by mail or by fax. The form can be found at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>.



## **IRS TAX DOCUMENTATION PROCESS INSTRUCTIONS FOR 2016 NON-FILERS**

If you did not file a 2016 federal tax return and are not required to file a federal tax return, you must submit an IRS Verification of Non-Filing Letter. This includes each parent in the household of a dependent student that did not file and independent students and their spouse if applicable. Dependent students are not required to obtain a non-filing letter if they marked that they will not file a 2016 federal tax return on both their FAFSA and the verification worksheet. The confirmation of non-filing must be dated on or after October 1, 2017. **NOTE:** The IRS Verification of Non-filing Letter is also required for any tax filer who has received a tax extension but still has not filed his or her income tax return.

### **What is an IRS Verification of Non-filing Letter?**

An IRS Verification of Non-filing Letter provides proof that the IRS has no record of a filed Form 1040, 1040A or 1040EZ for the year you requested. Non Tax filers can request an IRS Verification of Non-filing of their 2016 tax return status, free of charge, from the IRS in one of two ways:

#### **Option 1: Verification of Non-Filing Letter – Paper Form (4506-T) Request**

Download IRS Form 4506-T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>

- Complete lines 1 – 4, following the instructions on page 2 of the form. NOTE: On Line 3, be sure to enter the non-filer's street address and zip or postal code. Use the address currently on file with the IRS.
- Line 5 provides non-filers with the option to have their IRS Verification of Non-filing Letter mailed directly to a third party by the IRS. **Do not** have your IRS Verification of Non-filing Letter sent directly to Clarion.
- Line 7: Select the checkbox on the right hand side for Verification of Non-filing.
- Line 9: Year or period requested field, enter "12/31/2016".
- The non-filer must sign and date the form and enter their telephone number. Only one signature is required when requesting a joint IRS Verification of Non-filing Letter.
- Mail or fax the completed IRS Form 4506-T to the address (or FAX number) provided on page 2 of Form 4506-T.
- If the 4506-T information is successfully validated, you can expect to receive a paper IRS Verification of Non-filing Letter at the address provided within 5 to 10 days.

#### **Option 2: Verification of Non-Filing Letter – Online request**

Go online at [www.IRS.gov/transcript](http://www.IRS.gov/transcript)

- Click "**Get Transcript ONLINE**"
- Complete all required information. (If at any point, you cannot validate your identity – for example, you cannot provide financial verification information or you lack access to a mobile phone – you will need to complete Option 1 listed above instead.)
- Click "Continue"
- Select "**Verification of Non-filing Letter**" and in the Tax Year field, select "**2016**".
- If successfully validated, you will be able to view and print your IRS Verification of Non-filing Letter.

### **Mail or fax all documents to:**

**Clarion University, Student Financial Services Office, 840 Wood Street, Clarion, PA 16214**  
**Fax: 814-393-2520**