

Directions for 2018 IRS Tax Filer Verification

Office of Student Financial Aid
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IMPORTANT: Please indicate student's name and UIN on each page if a Tax Return Transcript is submitted to our office.

If a 2018 Amended Tax Return is on file for you with the IRS, you must submit a signed copy of your 1040X to our office.

Method #1) IRS Data Retrieval Tool (DRT) – preferred

The preferred method of updating your Free Application for Federal Student Aid (FAFSA) with your 2018 Federal Tax Return information is the IRS DRT. Returns filed electronically will be available to use the DRT 2-3 weeks after the return has been accepted by the IRS. Filers using a paper return will be available to use the DRT after the return has been received and processed by the IRS. In order to see if you qualify to use the DRT, please do the following:

- Log into your FAFSA at www.fafsa.ed.gov.
- Select Make FAFSA Corrections.
- Navigate to the Financial Information tab.
- If you qualify to use the IRS DRT, enter your FSA ID and click Link To IRS. Click OK to continue.
- Once on the IRS website, enter all of your information correctly. Click Submit.
- Check the "Transfer My Tax Information into the FAFSA" box and click Transfer Now.
- Once completed, select OK and return to the FAFSA - make sure to electronically sign with all FSA IDs required.

Detailed information on how to use the IRS DRT and information on why a person does not qualify to use the IRS DRT is available on the Office of Student Financial Aid website – www.osfa.illinois.edu/process/verification-process.

Method #2) Submit a signed copy of your filed 2018 Federal 1040 Tax Return and Schedules 1, 2, and 3.

Method #3) Request Tax Return Transcript ONLINE.

- It is available on the IRS website at www.irs.gov/Individuals/Get-Transcript.
- Click "Get Transcript ONLINE" and follow the directions. Please make sure pop-up blockers have been disabled.
- First Time Users will need to Register to use this service, otherwise Returning Users should LOG IN.
- Select Higher Education/Student Aid for the reason you are requesting a transcript. Click GO.
- Under Return Transcript, click "2018."
- If your pop-up blocker is off, you will be shown a copy of your Tax Return Transcript.
- Print your 2018 Tax Return Transcript. **Print student's name and UIN on each page** and submit it to our office.

Method #4) Request Tax Return Transcript online by MAIL.

- It is available on the IRS website at www.irs.gov/Individuals/Get-Transcript.
- Click "Get Transcript by MAIL" (Click OK for Authorized Use Box).
- Enter the primary tax filer's Social Security Number (or the IRS individual taxpayer identification number), Date of Birth, Street Address, and Zip or Postal Code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed and click "Continue."
- In the Type of Transcript field, select "Return Transcript." In the Tax Year field, select "2018."
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the online request was successfully transmitted to the IRS. Once received, **print student's name and UIN on each page** and submit it to our office.

If you are unable to use 'Get Transcript by MAIL' to retrieve a copy of your Tax Return Transcript – Please try the IRS automated phone transcript service at 1-800-908-9946 to receive your transcript by mail. Please allow 5-10 calendar days for delivery.

Do not request for your information to be sent to ILLINOIS by third party. The information will be requested again.

Additional information on obtaining a Tax Return Transcript is available at www.irs.gov/taxtopics/tc156.html.

NOTE: If you were a victim of identity theft in 2018 - please visit our website for directions on completing the verification process with your tax information - www.osfa.illinois.edu/process/verification-process.

Completed documents should be uploaded directly to UI-Integrate Self-Service. For instructions on how to access and upload documents please visit <https://osfa.illinois.edu/DocumentUpload>. Be sure to include your name and UIN on all documents uploaded. After you have uploaded your documents, you may confirm receipt within 3 business days at <https://osfa.illinois.edu/process/checking-your-status>. If you have any questions, please visit our website www.osfa.illinois.edu, contact a member of our counseling staff at (217) 333-0100 or email finaid@illinois.edu. **Please do not email documents to this email address.**