



STUDENT TAX FILER INFORMATION 2019-2020

Please fill out all applicable fields. If you choose to submit an IRS Tax Return Transcript, please ensure it is attached to this form before submission to Student Financial Services. Any incomplete forms will be returned to you for completion.

STUDENT NAME: _____

DATE OF BIRTH: _____ STUDENT ID: B00_____

SPOUSE'S NAME: _____

The Free Application for Federal Student Aid asks you, “For 2017, have you (and/or your spouse) completed your IRS income tax return or another tax return listed in 33?” (see FAFSA question 32). You indicated on your 2019-2020 FAFSA that you (and/or your spouse) have/will file a 2017 tax return. According to the Department of Education, we must request documentation supporting the information listed on your FAFSA.

Please Note:

1. If you and your spouse did not file a joint tax return, you may not use the IRS Data Retrieval. You must both submit a copy of your IRS Tax Return Transcript.
2. If you and/or your spouse filed, or will file, an amended 2017 IRS Tax Return, you must request an IRS Record of Account instead of an IRS Tax Return Transcript.

*** If you answered question 32 incorrectly and you (and/or your spouse) did not file a 2017 tax return, correct question 32. ***

Which income verification method did you use?

IRS Data Retrieval (follow the steps below) - Date Completed: _____

1. Log onto the FAFSA website (<http://www.fafsa.ed.gov>) and click the “Make Corrections” link.
2. Go to the Financial Information portion of the FAFSA.
3. Enter your FSA ID and click “Link to the IRS.”
4. The FAFSA will be saved and you will be transferred to the IRS website.
5. On the IRS website, enter the requested information.
6. Once the IRS has validated your identification, your IRS tax information will display. You can either transfer your information from the IRS, or choose to return to FAFSA on the Web from the IRS website. If you do not transfer your information or choose not to return from the IRS website, you will have to login to open the saved FAFSA. If you transfer your IRS tax information, questions that are populated with tax information will be marked with “Transferred from the IRS.”

IRS Tax Return Transcript (do not submit form without transcript attached & Banner ID written on the transcript)

Choose one of the following methods to request an IRS Tax Return Transcript:

- **Online:** Go to www.irs.gov, select “Get Your Tax Record” and request the “IRS Tax Return Transcript.” Transcripts are available in real-time in PDF format which can be printed and submitted as a hard copy or submitted electronically to Student Financial Services.
- **Phone:** Call 1.800.908.9946 to submit your request using an IRS automated process. Allow 5-10 business days after request is submitted.
- **Mail:** Submit IRS Form 4506T (available from IRS website). Allow 30 calendar days from the time the IRS receives the request.
- **Mobile App:** Download **IRS2Go** mobile app available from iTunes and Android Marketplace. Use the “Tax Records” to submit transcript request. Allow several business days after submitted.

A copy of your tax return is not acceptable documentation for Federal Student Aid.

Please contact your Admissions Counselor/Student Central with any financial aid questions.

Student Financial Services
11400 Concordia University Drive
Austin, TX 78726-4141

Student Central Phone: 1.512.313.4700
Student Financial Services Fax: 1.512.313.1670
Email: financialaid@concordia.edu