



## STUDENT TAX FILER INFORMATION 2020-2021

Please attach necessary documentation before submission to Student Financial Services.  
We are unable to process incomplete or unsigned forms.

STUDENT NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ STUDENT ID: B00\_\_\_\_\_

SPOUSE'S NAME: \_\_\_\_\_

The Free Application for Federal Student Aid asks you, "For 2018, 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 2020-2021 FAFSA that you (and/or your spouse) have/will file a 2018 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 or Tax Return.
2. If you and/or your spouse filed, or will file, an amended 2018 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 2018 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. Enter your FSA ID and click "Link to the IRS."
3. The FAFSA will be saved and you will be transferred to the IRS website.
4. On the IRS website, enter the requested information exactly as it appears on your tax return.
5. 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 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)**

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

- **Online:** Go to [www.irs.gov](http://www.irs.gov), select "Get Your Tax Record" and request the "IRS Tax Return Transcript." Transcripts are available in real-time in PDF format.
- **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.

**IRS Tax Return (do not submit form without physically signed tax return attached)**

- You should submit a physically signed copy of your 2018 Tax Return(s) including all schedules and W-2's
- We will accept the preparers signature in lieu of yours *only if* it has the name & PTIN of the preparer OR has the SSN/EIN & has been signed, stamped, or printed with his name and address

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](mailto:financialaid@concordia.edu)