



Office of Student Financial Planning
7400 Augusta Street
River Forest, IL 60305
(708) 209-3113 (phone)
(708) 488-4102 (fax)

Proof of Income for Verification Process 2012-2013

Students selected randomly by the Department of Education or by our office for verification must take the following steps:

- Proof of income can be submitted in one of two different methods if a tax return is filed:
 1. Once you file your tax return, you can login to www.fafsa.gov and request to retrieve your tax return using the IRS Retrieval Tool. Please note this feature is available 2 weeks after electronically submitting your tax return or at least 30 days if mailed. You must also select 'Already Completed' under 'Did you file an income tax return?' These steps will need to be repeated for the parent (if dependent).

IRS Retrieval Tool is **not** available for the following filing statuses: (Required to do Step 2)

- ✓ Married Filing Separately
- ✓ Head of Household (Married Couples)
- ✓ Amended Tax Return
- ✓ Puerto Rico Tax Return

OR

2. You may obtain a copy of the tax return transcript online at www.irs.gov or by telephone at (800) 908-9946. Please allow 5-10 days for receipt. Copies should be sent to your home address. You will need to send us a copy as part of the verification process.
Married couples who filed separately must request both transcripts and submit them to our office.
- Tax filers requesting an extension to file your tax return must submit the following:
 1. Copy of IRS Form 4868 or approval from IRS of extension longer than six months
 2. Copies of W-2 Forms from all employers or signed statement self-certifying adjusted gross income and taxes paid for self-employment
 3. Once tax return is filed, you must complete one of the two steps listed above under proof of income

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- Non-tax filers who earned income from work must submit the following:
 1. W-2 Forms for all employers
 2. Indicate amount(s) on signed **Verification Worksheet**