

2020-2021 Verification of Income for Tax-Filers

A **2018 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to [the IRS.gov website](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to [the IRS.gov website](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone in the user's name (*pay-as-you-go plans cannot be used*), and (3) specific financial account numbers (*such as a credit card number or an account number for a home mortgage or auto loan*). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2018 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2018, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2018; **AND**,
- Verification of Non-filing (VNF) Letter (*confirmation that the tax return has not yet been filed*) from the IRS dated on or after October 1, 2019 **or** a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation; **AND**,
- A copy of IRS Form W-2 for each source of employment income received **OR** an equivalent document for tax year 2018; **AND**,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2018.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2018 tax account information.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2018 must provide a signed copy of the 2018 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS **OR** documentation from the IRS that include the change(s) made by the IRS, **AND** one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return; **OR**
- A **2018 IRS Tax Return Transcript** (*that will only include information from the original tax return*), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **OR**
- A signed copy of the 2018 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, **OR** if unable to obtain a TRDBV, an equivalent document provided by the IRS **OR** a copy of the signed 2018 income tax return and applicable schedules the individual filed with the IRS; **AND**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.