PARENT TAX TRANSCRIPT REQUEST – AWARD PERIOD 2017-18
READ AND FOLLOW THE INSTRUCTIONS BELOW

Name: ______________________________________ Purdue ID Number: _____________________

Your FAFSA was chosen for verification. You need to provide the information requested before we can continue processing your application for financial assistance. Failure to respond promptly may limit the types of assistance you are eligible to receive.

COMPLETE OPTION 1 OR 2. DO NOT SUBMIT THIS FORM TO OUR OFFICE

OPTION 1: Transfer the IRS tax data onto the FAFSA and do not make any changes after the transfer. This is the fastest, easiest, and most secure solution for meeting this verification requirement. For on-line tutorial instructions, go to http://www.purdue.edu/dfa/students/how-to-apply/ffafsa.html.

Notes for Option 1:
• If you use the IRS transfer option and you had a pension roll-over, a message will instruct you to remove the roll-over amount. Please DO NOT remove the roll-over amount. Send documentation of the roll-over to our office and we will make the adjustment for you.
• If you make any changes to the FAFSA information after completing the IRS transfer, you will be required to complete Option 2.
• The IRS data retrieval is available approximately two weeks after electronic tax filing and eight weeks after paper tax filing.


Notes for Option 2:
• Federal regulations require an IRS tax return transcript.
**ACCOUNT TRANSCRIPTS & COPIES OF YOUR FEDERAL RETURN ARE NOT ACCEPTABLE**
• The IRS Tax Return Transcript is available approximately two weeks after electronic filing and eight weeks after paper tax filing.
• If you reported IRA/pension disbursements on your 2015 federal tax return that were rolled-over, attach documentation of the roll-over to your tax return transcript.

EXCEPTIONS:
➢ Individuals who filed an amended 2015 tax return must provide the IRS 2015 tax return transcript and a signed copy of the 2015 IRS form 1040X.
➢ Individuals who requested a tax filing extension must provide a copy of the 2015 IRS form 4868, a copy of the 2015 IRS approval of an extension beyond the automatic six-month extension, a verification of non-filing letter for 2015 from the IRS or other relevant tax authority dated on or after October 1, 2016, copies of IRS form W-2 for each source of 2015 employment income and if self-employed, a signed statement certifying the amounts of the individual’s 2015 adjusted gross income and income taxes paid.
➢ Individuals who were victims of IRS tax-related identity theft must provide: a Tax Return Data Base View (TRDBV) transcript obtained from the IRS or any other IRS tax transcript(s) that includes all of the 2015 income and tax information required 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 file an income tax return with Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Northern Mariana Islands or a foreign country, must provide either a 2015 tax return transcript or a signed copy of the 2015 income tax return from the relevant taxing authority.

Be sure to put the student’s name and Purdue ID number on all documents submitted to our office. If the student has sibling(s) attending Purdue West Lafayette or Purdue Polytechnic Institute and they applied for financial aid on the 2017-18 FAFSA using the same parent information, be sure their name(s) and Purdue ID number(s) are also listed.