PARENT TAX TRANSCRIPT REQUEST – AWARD PERIOD 2016-17
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.

If you are NOT required to file a 2015 federal, Puerto Rican, another U.S. territory or Freely Associated State or Foreign tax return: Mark an “X” here: _____ Additional verification requests will be posted to the student’s myPurdue account. Write the student’s name and Purdue ID number at the top and return this form.

TAX FILERS ONLY: COMPLETE OPTION 1 OR 2. DO NOT SUBMIT THIS FORM TO OUR OFFICE

OPTION 1: Transfer the 2015 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 www.purdue.edu/dfa/howtoapply/checklist.php.

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 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 your FAFSA marital status is married and your tax filing status is “single” or “head of household”, attach a note explaining why you qualify for this tax filing status.
• 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:
• If you filed an amended 2015 tax return, submit: the IRS 2015 tax return transcript AND a signed copy of the 2015 IRS form 1040X.
• If you filed an extension, submit: a copy of the 2015 IRS form 4868.
• 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 the 2016-17 FAFSA using the same parent information, be sure their name(s) and Purdue ID number(s) are also listed.