Parent - Verification of Income Tax Filer

Your application was selected for a process called "Verification." For more information on verification, see our Web site at: www.csuchico.edu/fa/policies/verification.shtml.

Your parents indicated on your 2015/2016 FAFSA, or the California Dream Application, that they have filed or will file a 2014 federal income tax return. CSU, Chico is required to verify their tax filing information.

Note: Consistent with the Supreme Court decision on the Defense of Marriage Act (DOMA), same-sex married couples must report both their information if they were LEGALLY married in a state or other jurisdiction (foreign country) that permits same-sex marriage. Additionally, unmarried same-sex LEGAL parents that are living together must report both their information as well. If your parents are unmarried and living together, please let us know so we can communicate to you the appropriate verification procedures for your family to follow.

Your parent(s) may provide this information in one of seven ways:

1) **Use the IRS Data Retrieval tool** available by submitting a FAFSA correction at www.fafsa.ed.gov. This option is not available to California Dream applicants. We recommend using this option, if it is available to your parents. Using this option will expedite the processing of your financial aid. Other than wages earned, do not change any tax information brought over from the IRS. Changing IRS retrieved data will not satisfy this verification requirement. If you need to make changes, or your parents have rollover amounts, contact our office after transferring the unaltered IRS data on your FAFSA. Generally, the IRS Data Retrieval tool is available 2 weeks after filing federal income taxes electronically or 8 weeks after submitting their federal income taxes by mail. Using the IRS Data Retrieval tool is the fastest and most effective way to provide tax filing information and satisfy the verification requirements.

2) **If parent(s) are unable to use the IRS Data Retrieval tool**, obtain a 2014 Tax Return Transcript from the IRS and submit it to the Financial Aid & Scholarship Office with student’s name and ID # on the top of each page. A copy of their federal tax return is not acceptable. Tax Return Transcripts must be requested by the tax filer directly from the IRS by visiting www.IRS.gov/transcript 2 weeks after filing a tax return electronically or 8 weeks if taxes were filed by mail. You may be able to retrieve and print your transcript online immediately or request your transcript to be sent to you.

3) **If your parent(s) have filed or will file a 2014 tax filing extension** with the IRS they must fill out and submit a 2015/16 Parent - Preliminary Verification of Income For Tax Extension Filers form. This form is available at www.csuchico.edu/fa/forms/printable.shtml. Make sure all additional documentation is attached.

**Note:** After filing their actual 2014 income taxes with the IRS, your parent(s) are required to provide us their actual federal income tax information by November 2, 2015. Your parent(s) may do this by using the IRS Data Retrieval Tool (see option #1) or providing a 2014 tax return transcript (see option #2). **If your parent(s) do not provide their actual tax information, you will be required to repay all 2015/16 disbursed financial aid funds.**
(4) If your parent(s) have filed or will file an amended 2014 federal tax return, they must fill out and submit a 2015/16 Parent - Verification of Amended Tax Return Filer form. This form is available at www.csuchico.edu/fa/forms/printable.shtml. All requested documents, as indicated on the form, must be attached. Make sure documents are signed by at least one parent and all tax schedules are attached. Student name and Chico State ID # must be printed on the top of each page.

(5) If your parents filed a joint 2014 income tax return, but have since been separated, divorced, or widowed and will continue to be separated or divorced for the duration of the 2015/2016 academic school year, they must fill out and submit a 2015/16 Parent - Verification of Separated/Divorced/Widowed Joint Tax Return Filer form. This form is available at www.csuchico.edu/fa/forms/printable.shtml. All requested documentation, as indicated on the form, must be attached. Student name and Chico State ID # must be printed on each page.

(6) If your parents have filed their 2014 income tax returns but are unable to obtain a copy of their income tax returns because of an identity theft situation, they must fill out and submit a 2015/16 Parent - Verification of Inability to Obtain Tax Transcript - (Identity Theft) form. This form is available at www.csuchico.edu/fa/forms/printable.shtml. All requested documentation, as indicated on the form, must be attached. Make sure all the attached documents are signed and student name and Chico State ID # are printed on the top of each page. Note: This process is applicable only to tax filers with identity theft issues.

(7) If your parent(s) filed a 2014 foreign tax return, submit a signed and translated copy of their foreign tax return, which shows the 2014 Adjusted Gross Income (AGI) and Taxes Paid. Foreign tax returns also include returns for Puerto Rico, Federated States of Micronesia, Palau, the Marshall Islands, US Virgin Islands, Common Wealth of Northern Mariana Islands, Guam, American Samoa, etc. Student name and Chico State ID # must be printed on the top of each page.

All requested documents must have the student name and ID # on the top of every page. All requested documentation must be submitted with each form. Failure to submit all required documentation will not satisfy the verification requirements.

Your parent(s) may contact our office if they have issues obtaining their tax information.

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