Student - 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.

You indicated on your 2015/16 FAFSA, or your California Dream Application, that you have filed or will file a 2014 federal income tax return (1040, 1040A, or 1040EZ). CSU, Chico is required to verify your 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.

You 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 for California Dream applicants. We recommend using this option, if it is available to you. Using this option will expedite processing of your financial aid. Do not change any tax information transferred from the IRS. Changing IRS retrieved data will not satisfy this verification requirement. If you need to make changes, or you 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 you 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. A copy of your 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. Print your name and Chico State ID # on the top of each page.

3) If you have filed or will file a 2014 tax filing extension with the IRS you must fill out and submit a 2015/16 Student - Preliminary Verification of Income For Tax Extension Filers. This form is available at www.csuchico.edu/fa/forms/printable.shtml. Make sure all additional documentation is attached. Note: After filing your actual 2014 income taxes with the IRS, you are required to provide us your actual federal income tax information by November 2, 2015. You may do this by using the IRS Data Retrieval Tool (see option #1) or providing a 2014 tax return transcript if you are unable to use the IRS Data Retrieval Tool (see option #2). If you do not provide your actual tax information, you will be
(4) **If you have filed or will file an amended 2014 federal tax returns**, you must fill out and submit a 2015/16 Student - 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 and all tax schedules are attached. Student name and Chico State ID # must be printed on the top of each page.

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

(6) **If you have filed your 2014 income tax returns but are unable to obtain a copy of your income tax returns because of an identity theft situation**, you must fill out and submit a 2015/16 Student - 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 your 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 you filed a 2014 foreign tax return**, submit a signed and translated copy of your foreign tax return, which shows the 2014 Adjusted Gross Income (AGI) and Tax 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.

You may contact our office if they have issues obtaining their tax information.
Phone: 530-898-6451
E-mail: finaid@csuchico.edu.