



Federal Income Tax Verification

Instructions

Aid Year: 22/23

Financial aid offices are no longer permitted to accept signed copies of Federal Income Tax returns from students and/or parents for verification purposes.

If selected for verification, a student and/or parent must submit an IRS Tax Return Transcript unless they are able to import the tax data onto the FAFSA using the IRS Data Retrieval process. Federal income tax data imported must be unaltered to satisfy the verification requirement.

Students and/or parents who are unable to use the IRS Data Retrieval process will be required to submit an IRS Tax Return Transcript.

Please note: Amended tax return filers. The IRS Data Retrieval process and the IRS Tax Return Transcript will only provide information from the original tax return and not from an amended tax return. As a result, both the IRS Tax Return Transcript and a signed copy of the amended IRS Form (1040X) must be submitted to the Office of Financial Aid when an amended tax return was filed.

Return the completed, signed and dated documentation to the Office of Financial Aid:

Mail: LLU Office of Financial Aid, 11139 Anderson St., Loma Linda, CA 92350

Fax: (909) 558-4283

Email: Scan document as a PDF. Attach to email message and send to finaid@llu.edu and/or your financial aid advisor. No photos please.

Bring in: Student Services Center, through the front entrance on the left hand side



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IRS Tax Return Transcript Request

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Tax filers can request, free of charge, a transcript of their 2020 Federal Tax Return from the IRS in the following ways:

Get Transcript Online - Available on the IRS website at www.irs.gov

Click on the “Get Your Tax Record” button on the home page. To register and use this service, you need:

- Your SSN, date of birth, filing status and mailing address from latest tax return,
- Access to a valid email account,
- Your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- A text-enabled mobile phone with your name on the account.

Get Transcript by Mail

Click on the “Get Your Tax Record” button on the home page. To use this service, you need your:

- SSN or Individual Tax Identification Number (ITIN),
- Date of birth, and
- Mailing address from your latest tax return
- Transcripts arrive in 5 to 10 calendar days to the address on file with the IRS

Telephone Request

- Call the IRS automated line at 800-908-9946 to order a transcript by mail
- Follow prompts to enter your Social Security Number and the numbers in your street address. Generally this will be numbers of the street address that was listed on the latest tax return filed.

If you have any questions, please email Finaid@llu.edu or call (909) 558-4509

Loma Linda University