Washington County Community College
One College Drive
Calais, ME 04619

In-state: (800) 210-6932
Fax: (207) 454-1018

FINANCIAL AID OFFICE

Linda L. Fitzsimmons
Financial Aid Director
lfitzsimmons@wccc.me.edu
(207) 454-1033

HOW TO PROVIDE INCOME DOCUMENTATION

As part of the verification process, the US Department of Education requires students to provide income documentation directly from the Internal Revenue Service (IRS). (If a student is considered dependent for financial aid purposes, the student's parents must also provide income documentation.) Photocopies of federal or state tax returns are NOT acceptable. There are two options for providing income documentation:

OPTION 1: IRS Data Retrieval Tool (preferred option)

On the FAFSA website, use the IRS Data Retrieval Tool to link your FAFSA directly with the IRS to retrieve 2017 income information. The IRS Data Retrieval Tool is the fastest, easiest and most secure method for meeting this requirement.
If you filed your taxes electronically with the IRS, the earliest you can use the tool is two weeks after you file your taxes. If you filed a paper tax return, the earliest you can use the tool is eight weeks after you file your taxes.
To use the IRS Data Retrieval Tool, follow these steps:

1. Go to: www.fafsa.gov and log in to your 2019-2020 FAFSA
2. Select: Make FAFSA Corrections
3. Select: Financial Information and follow the instructions to determine if you are eligible to use the IRS data retrieval tool.

<u>Tax filers who meet any of the following conditions cannot use the IRS Data Retrieval Tool and must request an IRS Tax Return Transcript (see below):</u>

- Tax filers are married and filed separate tax returns; or
- there was a change in the tax filer's marital status after December 31, 2017; or
- income information on the FAFSA was changed after using the IRS Data Retrieval process; or
- tax filers filed an amended tax return. Tax filers who filed an amended tax return must submit both an <u>IRS TAX RETURN TRANSCRIPT and an IRS TAX ACCOUNT TRANSCRIPT</u>.

OPTION 2: Tax Return Transcript

Request a Tax Return Transcript directly from the IRS if you are unable to use the IRS Data Retrieval Tool. If you filed your taxes electronically with the IRS, the earliest you can use the tool is two weeks after you file your taxes. If you filed a paper tax return, the earliest you can use the tool is eight weeks after you file your taxes. Requesting an IRS Tax Return Transcript adds approximately three weeks to this process.

To request and IRS Tax Return Transcript, follow these steps:
1. Go to: www.irs.gov
2. Select: "Order a return or account transcript"
3. Select: "Order a transcript"
4. Enter your Social Security number, date of birth, and the address on file with the IRS.

Send the Tax Return Transcript to the WCCC Student Aid Office as soon as you receive it. Be sure your name and Social Security Number appear on all pages of all tax transcripts sent to WCCC so that it can be added to your file (including spouse or parent tax return transcripts, if applicable). Signatures are not required on Tax Return Transcripts.
Alternatively, call the IRS at 1-800-908-9946 to request a Tax Return Transcript. Who must provide income documentation?
The student, if required to file a 2017 federal tax return.
The student's spouse, if the student was married at the time the FAFSA was filed and the spouse is required to file a 2017 federal tax return. Spouse income documentation is necessary even if the student was not married in 2017 or the student and spouse filed separately. Be sure the student's name and SSN appear on the tax transcript.
The student's parent, if parent information was provided on the FAFSA and the parent is required to file a 2017 federal tax return. Be sure the student's name and SSN appear on the tax transcript.
The student's parent's spouse if the parent was married at the time the FAFSA was filed, even if s/he was not married in 2017 and filed separately. Be sure the student's name and SSN appear on the tax transcript.

Other important information:

- Review of your financial aid application cannot proceed until the WCCC
- Student Aid Office receives all of the appropriate income documentation.

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- Be sure your name and Social Security Number appear on all pages of all tax transcripts sent to WCCC so that it can be added to your file (including spouse or parent tax transcripts, if applicable).
- Signatures are not required.
- You may send transcripts to the Financial Aid Office by mail, fax, e-mail or deliver them in person.