



## Instructions to Obtain Acceptable Verification of Tax Information

As part of federal student aid eligibility, the student and spouse will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective.

If you and your spouse filed separate 2023 IRS income tax returns, both you and your spouse must provide consent and approval to share and import income and tax information from the IRS on the FAFSA. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

**If 2023 income tax return information for the student and/or spouse was not available or could not be used, the student and/or spouse should provide the institution with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules (see additional instructions below).**

### Tax Return Filers choose ONE of the following:

- **IRS Tax Return Transcript:**  
Request a free Tax Return Transcript for tax year 2023, by contacting the IRS at 1-800-908-9946 or [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript)
- **IRS Federal 1040 Tax Return (signed):**  
You may provide a **signed** copy of your 2023 Federal 1040 Tax Return form and all submitted tax schedules (1-6). If completed by a tax preparer or tax professional, the Federal 1040 Tax Return form must include name and address of the preparer on the return, as well as the tax preparer's Social Security Number (SSN), Employer Identification Number (EIN), or Preparer Tax Identification Number (PTIN). Copies can be **sent via secure fax at: (920)403-3062, secure document upload at [snc.edu/go/upload](http://snc.edu/go/upload), or by mail to St. Norbert College, Office of Financial Aid, 100 Grant Street, De Pere, WI 54115.** Please add student's name and/or ID number before submitting.

### Important Notes:

- If you and/or your spouse filed an amended IRS income tax return for tax year 2023, you must provide:
  - A signed copy of the 2023 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS as well as either
    - IRS Data Retrieval Information on the FAFSA with all information from the original tax return **OR**
    - A **2023 [IRS Tax Return Transcript](#)** (that will only include information from the original tax return and does not have to be signed), **or** any other IRS tax transcript(s) that includes all of the income and tax information required to be verified, **OR**
    - Signed copy of a 1040 tax return.
- If you are married, and filed separate 2023 tax returns, 2023 IRS tax return transcripts or signed copies of the Federal 1040 Tax Return for 2023 must be submitted for you and your spouse.