

Student (and Spouse if applicable) Tax Forms and Income Information

Check:	If you:	You must:
<input type="checkbox"/>	have used the IRS Data Retrieval Tool to transfer 2019 tax return information to the 2021-2022 FAFSA.	Complete this Verification Worksheet and return it to our office. (You DO NOT NEED to provide a copy of your IRS Tax Return or Transcript at this time unless your 2021-2022 FAFSA has a 400 or 401 Comment Code.)
<input type="checkbox"/>	have not yet used, but will use the IRS Data Retrieval Tool to transfer 2019 tax return information to the 2021-2022 FAFSA.	Complete this Verification Worksheet and return it to our office. (You DO NOT NEED to provide a copy of your IRS Tax Return or Transcript at this time unless your 2021-2022 FAFSA has a 400 or 401 Comment Code.)
<input type="checkbox"/>	are <u>unable or choose not to use</u> the IRS Data Retrieval Tool but will provide a <u>signed 2019</u> Tax Return OR <u>2019</u> IRS Tax Return Transcript.	Attach a signed copy of your 2019 Tax Return, Schedules 1, 2, & 3 or 2019 Tax Return Transcript. **Tax Return must be signed by filer or tax preparer** Instructions for ordering an IRS Tax Return Transcript listed on page 3.
<input type="checkbox"/>	filed a FOREIGN TAX RETURN or had foreign income in 2019 .	Provide an English translation of the foreign financial aid document. If you filed a Puerto Rico tax return, provide a signed copy of the 2019 Puerto Rico Forma Unica tax return (does not need to be translated).
<input type="checkbox"/>	<u>WORKED</u> , but are <u>NOT REQUIRED</u> to file a 2019 Federal Tax Return.	<ol style="list-style-type: none"> 1. You (and spouse) must provide copies of all 2019 W-2s and 1099s. 2. Student (and spouse) must request an IRS Proof of Non-Filing Letter from IRS. Instructions listed on page 3 of this document.
<input type="checkbox"/>	DID NOT work and NOT REQUIRED TO FILE a 2019 Federal Tax Return.	<ol style="list-style-type: none"> 1. List your source(s) of income in 2019 (i.e. Disability, Pension, etc.) Source(s): _____ 2. You (and spouse) must request an IRS Proof of Non-Filing Letter from IRS. Instructions listed on page 3 of this document.

Exception: Amended Tax Filers: If you filed an amended **2019** Federal Tax Return and were unable to use the IRS Data Retrieval Tool, you must submit a signed copy of your **2019** Tax Return or Tax Return Transcript as well as a signed copy of your amended Federal Tax Return (IRS Form 1040-X). If you were able to use the IRS Data Retrieval Tool, you must only submit a signed copy of your amended **2019** Federal Tax Return (IRS Form 1040-X).

Signatures

- ✓ By signing this worksheet, I certify that all information reported is complete and correct.
- ✓ I am also granting the Office of Student Financial Planning permission to update the FAFSA through Federal Student Aid online correction tool to match the values found on this and other verification documents I have or will provide.

WARNING: I understand if I purposely give false or misleading information on this worksheet, I may be fined up to \$20,000, sent to prison, or both.

Student's Signature (Required)

Student ID#

Date

Spouse Signature (If Applicable)

Date

Requesting Tax Return Transcript or Verification of Non-Filing

1. Order Online “Get Transcript ONLINE” (Electronic PDF):

- Go to irs.gov
- Select “Get Your Tax Record” next, select “Get Transcript Online” and then select “Create Account” unless you have an account with the IRS, then select “Log In”
- To make an account, you must have a Social Security Number, date of birth, filing status, mailing address from your latest tax return, and access to your email account.
- In order to authenticate your identity you must have a credit card number or an account number from an auto loan, mortgage, home equity loan or line of credit (only for authentication purposes, you will not be charged)
- Have your mobile phone ready (must be a phone whose account is in your name)
- Follow the prompts to set up your User Profile
- Indicate “Higher Education/Student Aid” when asked to “Select a reason you need a transcript”
- Select the appropriate “Return Transcript”
- An electronic PDF of the return transcript will now be displayed and can also be downloaded

2. Order Online “Get Transcript by MAIL”:

- Go to irs.gov
- Select “Get Your Tax Record” next, select “Get Transcript by Mail”
- Enter the primary tax filer’s Social Security Number, date of birth, street address, and zip or postal code. The IRS will only allow you to use the address currently on file with IRS. Generally, this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the IRS 8822 Form, the IRS may have the updated address of file. If the address change has not been complete, please fill out a 4506-T Form. Instructions listed below.
- Click “Continue”
- In the **Type of Transcript** field, select “Return Transcript”
- In the **Tax Year** field, select the appropriate tax year
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript within 5 to 10 business days from the time the online request was completed.

3. Order Tax Transcript By Phone

- Call the IRS at 1-800-908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally, this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the IRS 8822 Form, the IRS may have the updated address on file. If address change has not been complete, please fill out a 4506-T Form. Instructions listed below.
- Select “Option 2” to request an IRS Tax Return Transcript
- Enter the appropriate tax year
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 business days from the time the order was placed.

4. Verification of Non-Filing or Address Change

- You will be filing out a 4506T Form
 - i. Go to irs.gov
 - ii. Select “Forms and Instructions”
 - iii. Select Form “**4506-T**”
 - iv. Fill out this form and Mail or Fax it to the appropriate address (listed on the first page of the form).

5. Unacceptable Forms

- **IRS Tax Account Transcript and IRS Tax Summary**